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[7] Help Magician footnote: DO NOT EDIT; Exported RTF File. Not intended for re-import into the Help Magician.

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Data Capture And Screen Format General Information

Whenever a field is presented on the screen in your “highlight” color (i.e. bright blue is the standard windows highlight color) it is the active field and is selected. This means that if you start typing, what is there will be erased.

To type a correction, click your mouse pointer at the place where you want to type. The “highlight” color should disappear.

Use your tab key or your enter key to move to the next field.

Use the Up Arrow Key to go back to a previous field.

Or use your mouse arrow to click on the specific field you want to change.

Remember that when lists are sorted in alphabetical order, capital letters will appear before small letters and numbers before capital letters. The lists in the List Boxes are converted to Capital letters for the display so that the names will appear in their proper order. The names are not converted in the "Quick Fill Typing Boxes" so that they will appear in the Fields in their originally entered state when selected.

Because the system uses variable width fonts on the screen to display information, you may find that your typing does not fill a box before you are automatically moved to the next box. Variable width fonts cause some letters to take up more space than others. The field outlines on the screen are set up to accommodate the widest possible characters so they usually will not fill up before you are moved to the next field.

Printing Reports

All reports which can be printed from the REPORTS MENU, can also be printed from the individual function screens by clicking the PRINT Button on the Tool Bar.

PRINT always uses the standard Printer Interface. Whatever features are enabled by your printer driver will be available to you for use in printing.

Cut, Copy Paste

If you are entering the same information in a data entry field on many consecutive entries, you can highlight the data in the field, then click on EDIT /COPY. This makes a copy of the data on your clipboard. On the next item you add, when the data field is highlighted, click on EDIT /PASTE (or CTRL/V) to repeat the saved information without typing. This can be done with any field using the Clipboard. As in any other application, whenever you cut or copy it erases the current contents of the Clipboard. If you have established Defaults for Color, Breed, etc, the data entry fields will automatically fill in with the default when you add a new entry.

Tool Bars and the Function Windows

If your Tool Bars are hiding behind the Function Windows, try changing your Windows Desktop Settings to 800 X 600 resolution or higher.

Also make sure you have the Windows Desktop settings set to Small Fonts so that the words on the screen do not run off the edges. You can change the Windows Desktop Settings by clicking your right mouse button when your mouse cursor in positioned on the desk top (not in an application screen). Select Properties from the popup menu.

Photos

When capturing Photos and Logos, you will be limited by the capacity of your computer and the Printer. The more RAM you have the better the resolution you can use on your images. If the Photo Window shows empty or the photo on the pedigree does not print, it indicates that the image is taking up too much RAM memory in the computer or the printer.

BECAUSE ALL SCANNERS AND PRINTERS ARE DIFFERENT, PLEASE REFER ALL QUESTIONS REGARDING IMAGE RESOLUTION, IMAGE CAPTURING, AND PRINTING TO YOUR SCANNER OR PRINTER MANUFACTURER.

How to Get Help

If you need more detailed assistance call the Toll Free Number at 1 (800) 645-9149.

If the toll free doesn't work, you can call the Toll Number at 1 (916) 645 - 9148.

You can email to animaltr@jps.net.

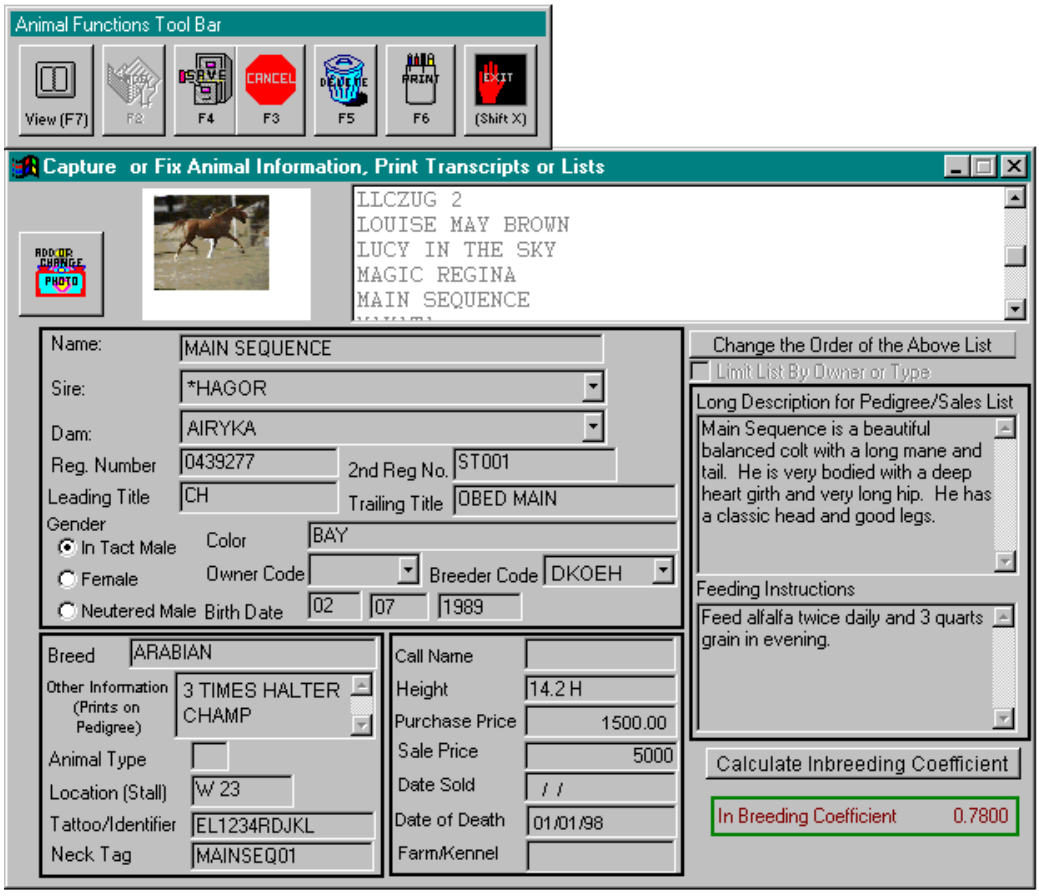
Or you can Fax to : 1 (916) 434-0733

You can also print out the user manual by: .....

How to Use the System

All of the Entry Screens Use the same “Controls”. These are the Buttons you click on that cause things to happen. This section provides an introduction to the standardized portions of the screens. The image below is a sample of a typical standard function window screen.

Tool Bar



Function Window ^

Each Function is opened in a "Window". You can open one **Function Window** over another and switch back and forth. If you open too many windows for the capacity of your system, you might get a system message or Windows may crash. If you don't need to leave a Function Window Open , you should close it by clicking the X in the Control Area or The Exit Button on the Tool Bar.

1. Each Function Window has a **Tool Bar** with Buttons for ADD, DELETE, CANCEL, SAVE, PRINT and EXIT. Many function screens also have a VIEW Button on the Tool Bar for accessing the Animal Note Book Directly for the selected Animal. When the ADD Button is clicked, it is disabled (grayed out), the entry fields become enabled (change color), and the CANCEL and SAVE Buttons become available (colored). When you click the SAVE or CANCEL or DELETEButtons, They become unavailable and the ADD Button is again colored (available).

When you open a new Function Window, if another Function Window is open, the Tool Bar for the first Window will disappear. When you click on the first open Function Window, the Tool Bar for that window will reappear and the second window's Tool Bar will disappear. Each Tool Bar has a title on it for reference.

If you slide your mouse when you are clicking on the Tool Bar, You can cause the toolbar to "Dock" into the title bar at the top of the screen. If this happens, you can get it back down by holding down the mouse button while in the tool bar and dragging it down onto the desktop.

You don't have to click on the buttons on the tool bar. Each One has an F Key associated with it that can be pressed when you want to do the function represented by that button. (i.e. press F2 to Add a new record.) Exit is F8.

2. Each Standard Function Window has a list box (upper Right or Top of window) which displays the entries you have already made. To select an item from the list, double click it with your mouse or highlight it and press enter. There is a scroll bar on the side of the list as soon as you have more than 4 items in the list. When an item in a list is highlighted, you can type the first character of the Entry to get the cursor to move to that position in the list. Most list boxes have a button nearby for changing the order of the list and a check box for limiting the contents of the list. Look for these buttons and check boxes on the individual function windows to determine their specific functions.

3. Each Primary Function Window will likely have at least one "Selection List" that is used to fill in the names or other information from preestablished information you have typed before and that has been stored. An example of a selection list on the picture above is the Sire and Dam Entry Boxes. All Selection Lists are Quick Fill Typing Boxes. This means you start typing in the box and it will begin to fill in with the first item in the list that matches the character(s) you have typed. If you type an entry that is not in the list, you will be prompted to Add the item. If it is a new animal, you may be asked to add the details for the animal or the system may just create a record for the name. If you indicate that you do not want to add the item, you may need to retype the item so it matches one in the list. At any time that you are typing, you can click the down arrow on the right hand side of the list and scroll the list to select an item which will replace what you have typed.

4. To Add a new entry, you will click on the ADD Button or Press F2. The Detail Data Capture Fields will change color and the highlight bar will appear in the first data entry field on the Function Window.

5. To Fix an entry already existing in the List at the top of the Function Window, Double Click on the item in the list. The Detail Data Capture fields will change color and fill with the data in the selected record.

6. To save your changes, Click the SAVE Button or press F4.

7. To Delete an Entry from the List at the Top of the Window, Double click on the entry to select it. The data in the selected record will appear in the detail fields. Click the DELETE Button (or Press F5) on the Tool Bar. A message box appears to confirm the deletion. When the Delete is complete, the Entry will no longer show in the List at the Top, and the entry fields will change back to their "unavailable" color.

8. To Cancel changes you might have made by accident or to put away a record you have only viewed and not changed, click CANCEL or press F3. The record is put away and the entry fields change back to the disabled color. Changes you have made to the entry are deleted.

9. To Exit a Function Window, click the X in the Control Box or Click the EXIT button on the Tool Bar or Press F8.

10. On Function Windows where animal records are maintained such as Animal Records, Health and Services and Competition, you can click the VIEW button on the Tool Bar or press F7 at any time that an entry has been selected from the List Box and is showing in the detail. You will then see the Animal Note Book which consolidates all records for the selected animal in one place.

11. Each standard Function Window will usually have a Check Box for Limiting the List that shows in the List Box at the top of the window. The limit can be set up to stay on the list so that each time the Function Window is open only those items that meet the limit criteria will show on the list. All list items are still in file however and the Limit can be changed at any time.

12. Each standard Function Window might have a button for ordering the list. This means that you can click this button and then display the items list at the top of the window in a different order, for instance in registration number order instead of name.

13. Each Function window has a Print Button (F6) on the Tool Bar that allows the user to print the same reports as are available on the Reports Menu.

List Boxes

A list box contains a list of items. When you double click on one of the items, it will be selected so that it can be editted. You can move through a list by clicking on the up and down arrows on the right side of the list box or you can type the first letter of the beginning word of the item you are seaching for and the list will move to the first item in the list that starts with that letter. You can then scroll to the item you are looking for.

List Boxes differ from drop down boxes in that you double click on the item in the list to select it. Drop Down Boxes only require a single click.

Quick Fill Drop Down Lists

When ever you see a typing box that has a "down arrow" on the right of it, it is a quick fill box. This means that as you type letters in the box, it will search the list attached to it to find the matching entry based on characters typed. Once you find the correct item, you can tab out of the box. If appropriate, the system will prompt you to add the item to the list if you type something that is not already in the list. If you choose not to add the item to the list, you will need to retype it so it matches something in the list.

On the Animals List, the system will add the name to the Animal File if you type one that is not in the list. This is necessary so that pedigrees will fill in and so that health, competition and breeding records will have the necessary reference animals. Other lists which will add items include, providers, Expense Account Codes, Show Classes, Show Names, etc.

Other lists might not force a matching entry. These include Health Services Items.

Change Order Buttons

On many windows there are buttons which will change the order of the list in the List Box at the top of the Window. When you click the button you will get ~~a dialog box~~ that will prompt you to indicate the order you want the list in. Click in the circle (Radio Button) of your selected choice and then click Finished. The list at the top of the window will rearrange itself to the order you selected. Click the Button again to put the list back to the original order.

Limit List Check Boxes

On many windows, you can limit the contents of the List by criteria meaningful to that list. If you want to Limit the contents of the list, click the Limit List Check Box. You will get one or more ~~dialog boxes~~ that will specify the choices for limiting the list. Click next to your choice in the small circle (Radio Button). Then click Finished. When you exit the function window, you will be prompted whether you want the List Limit to be the Default for the List. If you click Yes, the next time you enter the window, the list will be limited as you specified.

Gender / Sex

Gender is selected by Radio Buttons. Sex will now be recorded in the Animal File as Male, Female , or Neutered. To select the correct sex (gender), click on the radio button next to the appropriate choice. For owners of previous versions of Animal*Trac, when the data is imported to the new version, the gender field will be converted to Male Female or Neutered.

Cycle Through Windows

Use this feature to bring forward hidden windows. You may need to click it more than once to see all of the hidden windows.

Navigating the System

Menus

The Menu Bar on the Top of the Introduction (Splash) Window provides for primary Navigation through the functions. It is divided into Groups of Like Items.

- On the File Menu you have Maintenance Items and Access Type Functions such as View the Animal Note Book. Maintenance Items include setting up titles on reports, Default Values, Accessing the Report Designer and anything else that doesn't fit elsewhere.
- The Edit Menu includes Cut, Copy, Paste and Undo. These features are used on highlighted information in individual fields.
- The Animal Records Menu includes all Functions Associated with the Animals themselves as opposed to their owners, income and expenses or other features.
- The Sales and Costs Menu Includes all items related to income and expenses, customers, expense codes, and sales lists.
- Pedigree Menu includes displaying and printing the pedigree in two different formats.
- Reports Provides most of the reports available on the individual Function Windows.
- Inventory includes Equipment and Supplies.
- Billing includes all functions associated with creating, maintaining, printing invoices and managing customer accounts.
- Window allows the user to use the Cycle function to pop hiding windows forward and to move from one open Function to another.
- Help

The Table of Contents is organized somewhat like the Menu so the user can find things easier.

Where Do I Start?

1. Decide on your Income and Expense Accounts and Enter the Codes in ADD/FIX INCOME AND EXPENSE CODE in SALES / COST MENU. The Codes are 4 characters and can be any combination of letters or numbers.

2. Begin setting up your Health and Services Choices List for use in recording Heath or Services Items. Record common veterinary, service, or other categories here. These can be items like “Wormed with Ivermectin”, or “Shoes All Around”.

3. Enter your Provider Names and Addresses in the Providers Address Book. This gives a list of Providers for the Expenses Function, the Health and Services Function and the Billing Function.

4. Set up your customers in the Customer Address Book and assign them 5 character customer codes. Customer Codes can be any 5 or fewer characters and must be unique.

5. Enter the Names of all of your animals in the ADD/FIX ANIMALS function. If you want the pedigree to work correctly, you will need to enter the names of the male and female parents. You should also enter an Ownership Code (REF for ancestors, OWN for animals you own) and if you have multiple animal types, record a type code.

6. To complete the pedigrees, in ADD/FIX ANIMALS add an animal record for each name in the pedigree unless the name is a repeat of a name in another pedigree. If you enter the pedigree names from right to left (off a printed pedigree sheet) , the ancestors names will already be in the Selection List when you start to fill in the male and female parent names. You can also enter the pedigree ancestors directly on the Pedigree Function Window, but the same principles apply. If you have not already added an ancestor, you will need to create an entry for it. You can View and Print pedigrees from the View and Print Pedigree Function Window.

In the detail help for each Function Window, you will see views of the screens associated with each function included in Animal*Trac. Only those elements of the screen which are not standard will be explained in the detailed explanations. Refer back to the ~~How to Use System~~ section for the discussion of common tool bar items and Function Window Items. The Green Underlined Words are Links to other topics. Use them to get more details.

File and Edit Functions

Cut, Copy and Paste

You can CUT or COPY any highlighted item from the detail typing boxes on any screen. The system puts the information on the clipboard. It stays there until you cut or copy something else. Use PASTE to put the copied or cut item in a highlighted area in a detail field on a function window. These functions work the same as Cut, Copy and Paste in any other application.

Macintosh Only: The PASTE SPECIAL Function is used to attach the photo to the animal record on the Basic Animal Information Screen (ADD / FIX ANIMALS). Once you have the picture copied from the graphics editor onto the clipboard you use PASTE SPECIAL to move it from the clipboard to the animal photo capture window.

Back Up the Files

Close Function Windows before starting backup. If you don't, you will get a program error when you go back to the open windows.

You can select BACK UP FILES on the FILE Menu. You will be asked if you have closed all of the Function Windows. The system defaults to N in case you accidentally press the enter key at the wrong time. You will be prompted to place a backup disk in the A drive. The system asks for multiple disks to ensure that there is enough disk space to save the files. You can put all files on one disk if you have small files. After all of the files have been copied, you will be prompted that back up is complete. You should alternate your back up disks so that you use different disks on alternating days.

If you get an Out Of Space Error or Cannot Write to BACKUP_ANIMAL then it means the disk is full. This will not hurt anything but you may need to redo the last backup.

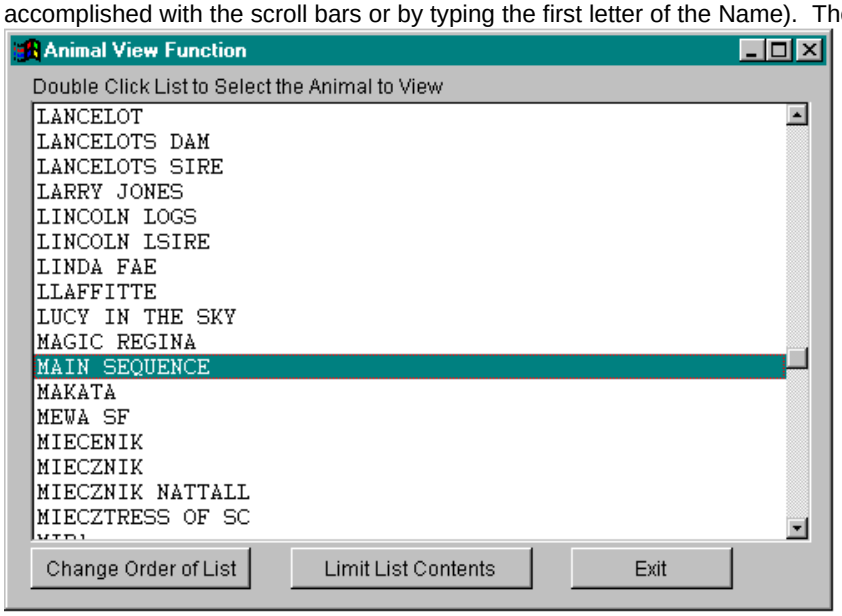
Restore Files from Backup

To Restore from backup if a file has been irretrievably corrupted, Select RESTORE FROM BACKUP. You will be offered a menu of files. Restore only the ones you need by clicking on the "Radio Button" next to the menu item. The system will prompt you for the disk and for the path. After restoration is complete, you may need to reorganize files.

Access Animal Note Book

The Animal Note Book is a Tabbed Function Window that allows you to see the Animal Information, Owner and Breeder Information, Health and Services Records, Competition Records, Breeding Records and the Pedigree. You can edit and add items on each page of the note book, although at this time, some very specific information regarding special editions, might not be available in this format. If you can't get everything you need, you can access the Add /Fix Animals and select the Animal from the List in include the details

From the FILE Menu, you can click Animal Note Book . You will see a Function Window with a list of all animals entered on the system. Find the Name in the list and double click it (navigation through the list can be accomplished with the scroll bars or by typing the first letter of the Name). The Note Book will be displayed.

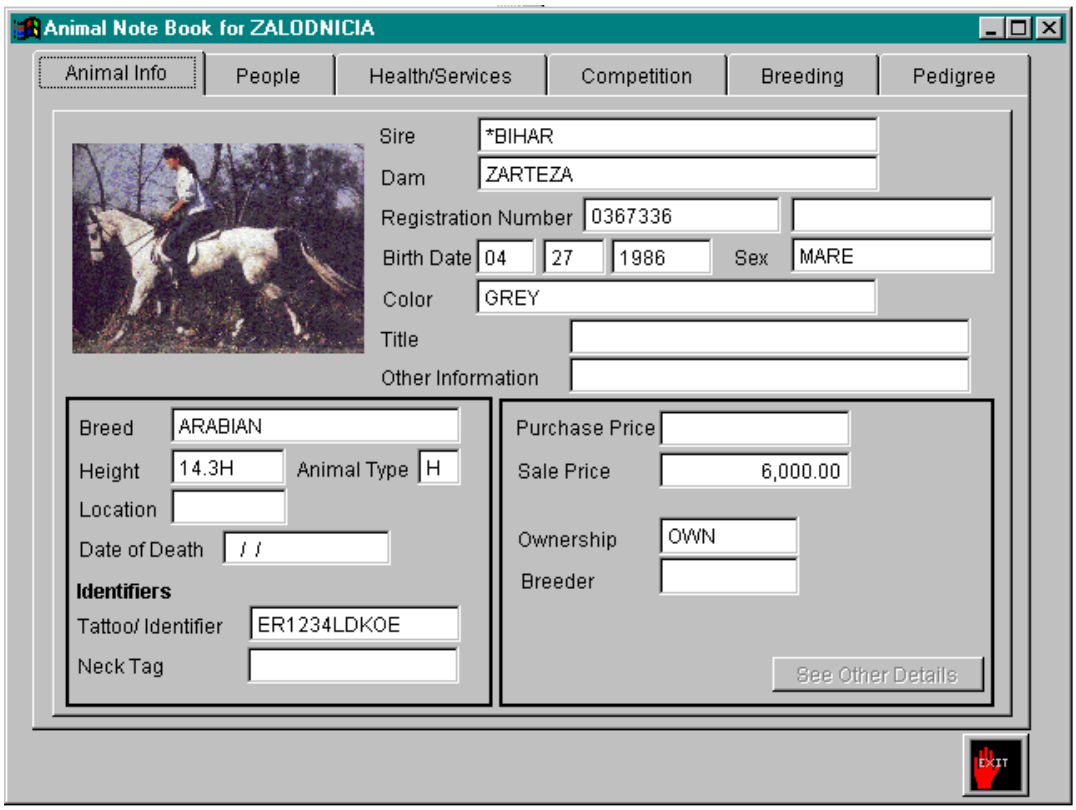


As you can see, you can change the order of the list of animals to reflect Neck Tags, Registration Numbers, or tattoos along with the names. You can also limit the contents of the list to a specific animal type or a specific owner.

After you have reviewed the Note Book for the animal you select, you will be returned to the above list where you can select another animal, or Exit the Function Window.

You can also click the VIEW Button on the Animal, Health and Services, Competition and Breeding Function to review the notebook pages for the select animal.

After you select the Name of the Animal to show in the Note Book by double clicking in the list, the Note Book Function Window will pop up with the information displayed on each page.



The picture above shows the format of the Animal Information Page. You can type changes on this page and they will be saved in the Animal Record.

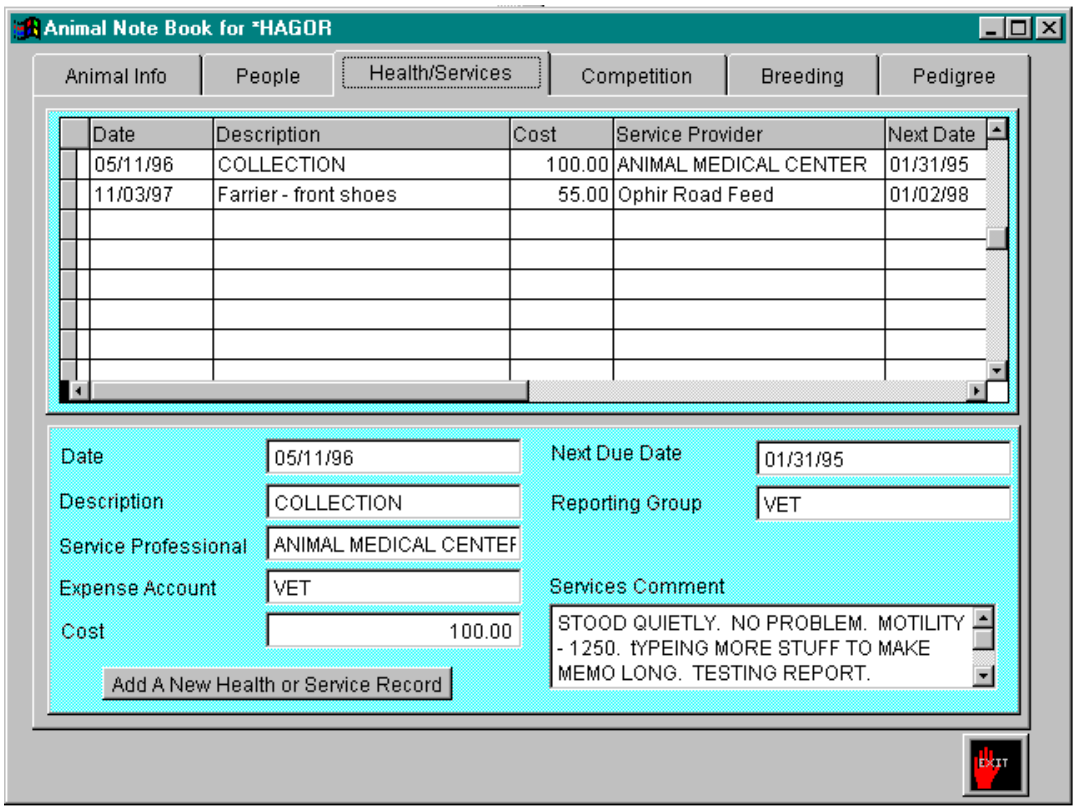
To review the Owner/ Breeder Information, Click the People Tab. You cannot edit the entity information that is shown on this screen, but you can change the Owner Code or the Breeder Code to change the information that is displayed in the notebook. The display will change the next time you view the animal in the note book.

Click the Health / Services tab to view all health or services which have been added for the animal.

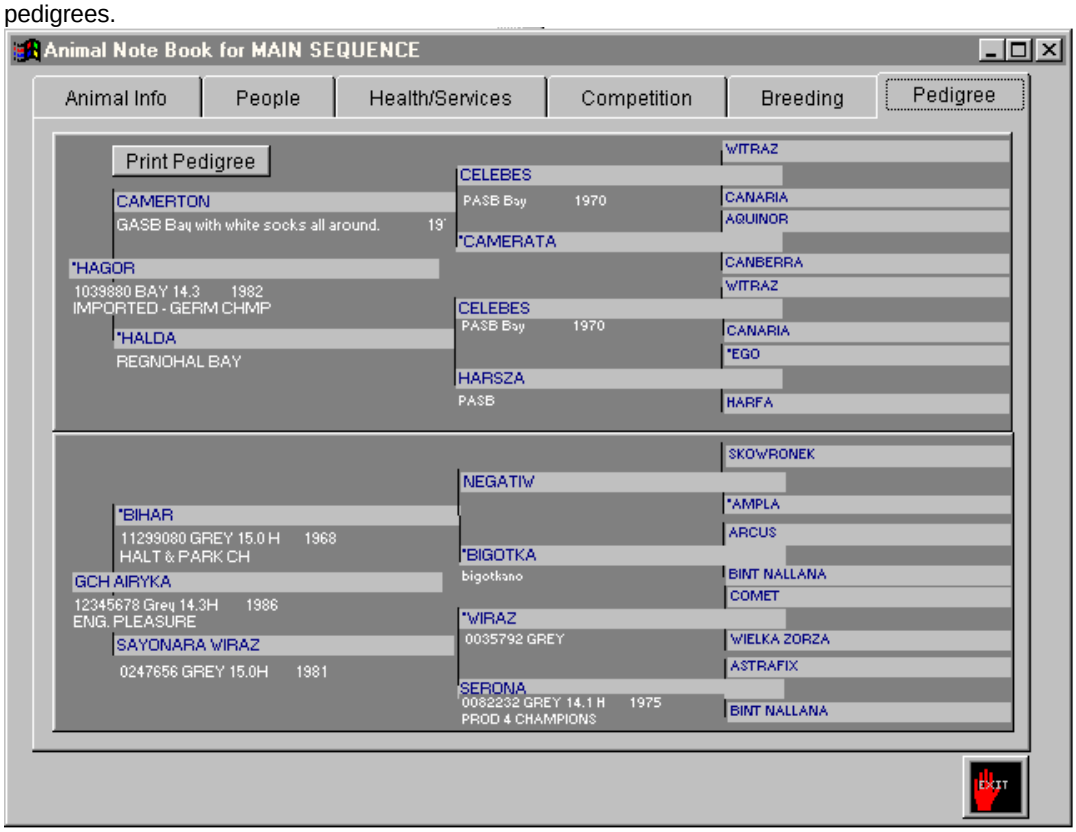
Click the Competition Tab to view Show or Race Results.

Click the Breeding Tab to view the breeding records for this animal.

The next picture demonstrates the format of each Information Tab Page. On the top is a grid where all records are displayed. Although you cannot see all of the information about an item in the Grid, you can click on that row in the Grid to see the details in the the Detail Entry Boxes Below. You can type in new information in the Entry Boxes and it will update the record directly. There is no Cancel capablity in the Note Book so what you type will be saved in the Health and Services, Events or Breeding Files. You can add a new service or health record, competition or breeding record for this animal by clicking the button on the bottom and typing in the new information. It will be saved and will appear in the grid. The new information will only be recorded for the animal you have selected to display in the notebook. You cannot post multiple entries of the same health or services records to many animals from the notebook. Use the Health and Services , Multiples Function to post the same health or service item to many animals.



The Pedigree on the Animal Note Book is View only. You can print it from the Pedigree Page but you cannot change any ancestor information. See Pedigrees for information on how to add ancestors and print pedigrees.



Re Organize Files

This function resorts your files if the sorts for some reason have become corrupted. It also requires that all of your Function Windows are closed or you will get a program error. Use this function if your pedigrees are all of a sudden not filling in or the wrong items are printing on reports.

Change the Title on Your Reports

Type the Farm, Ranch or Kennel Name in the space provided exactly as it should appear on your reports. The title should automatically center on the report. If you want to change the heading for a specific report, select the Function again and type in the new name.

Change Address on Invoice (Professional Version Only)

This Function Allows you to type in the name and address for printing on the top of the Invoice. An address capture screen will appear on the desktop. Fill in the appropriate fields. Fields that are left blank will not be printed on the invoice.

Capture Logo

You can capture your logo using your scanner and save it to be printed on your invoices. In the future the logo might be included on other reports (look for upgrade information).

Windows:

You will be prompted to select the name of the file which contains the logo from a standard windows file open dialog box. The file must be saved somewhere on your hard drive or other media that is always available because the program only sets a pointer to the file in the Logo Picture field. Thus if the file is on a floppy disk and you take the disk out of the drive, the Logo will not be found and you will cause an error.

Macintosh:

On the Macintosh, you must open the image in the image editor, copy it to the clipboard and then use Paste Special to Put the file name pointer in the Logo File. The logo file should always be a PICT file.

Copy Data from Previous Installations

ALWAYS BACK UP BEFORE YOU INSTALL A NEW VERSION

When you are upgrading from a previous product, you should first install the new product in a different location (directory or folder) than the original installation. You then select this function from the FILE menu to copy your animal, health, competition and other data over to the new system. You must know the path to the previous system data in order for the data to copy correctly. You can determine the path by looking in FINDER or FILE MANAGER or EXPLORER. Type the path exactly as you see it including capital and small letters. After the previous data has been copied, you will be prompted that the updating of files is complete.

If you are updating from a previous Windows 3.1, Macintosh, or Dos Version, the Update Process will ask you to select a Code Page for each file it updates. Click in the appropriate Circle (Windows for Win95, 98 or NT, Macintosh for the Mac) and click Select.

If you know you have typed the right path and you get an invalid path message, it is possible that the necessary files are not in the directory or folder you have indicated. Make sure the file named Animal.dbf is in the directory.

If you have purchased a new computer and the previous installation is on a different computer, Use the Back up function on the Previous Animal*Trac on the old computer to back up your data onto 3.5" disks. If you get a message that a disk is full, you will need to find another way to copy the file to the new computer (i.e. Using a Zip Drive or download WinZip from the Internet and Install it on both computers. Then Zip the file onto the 3.5" disk and unzip it onto the new computer's hard drive). Make a Directory or Folder on the new computer. You can call it anything you want. For purposes of this discussion we'll call the new folder ATDATA. Copy the data from the 3.5" disks into the new folder on the hard drive. Be sure you have the file named Animal.dbf in the new folder. Then run the instructions in the first paragraph using C:\ATDATA as the path to the data.

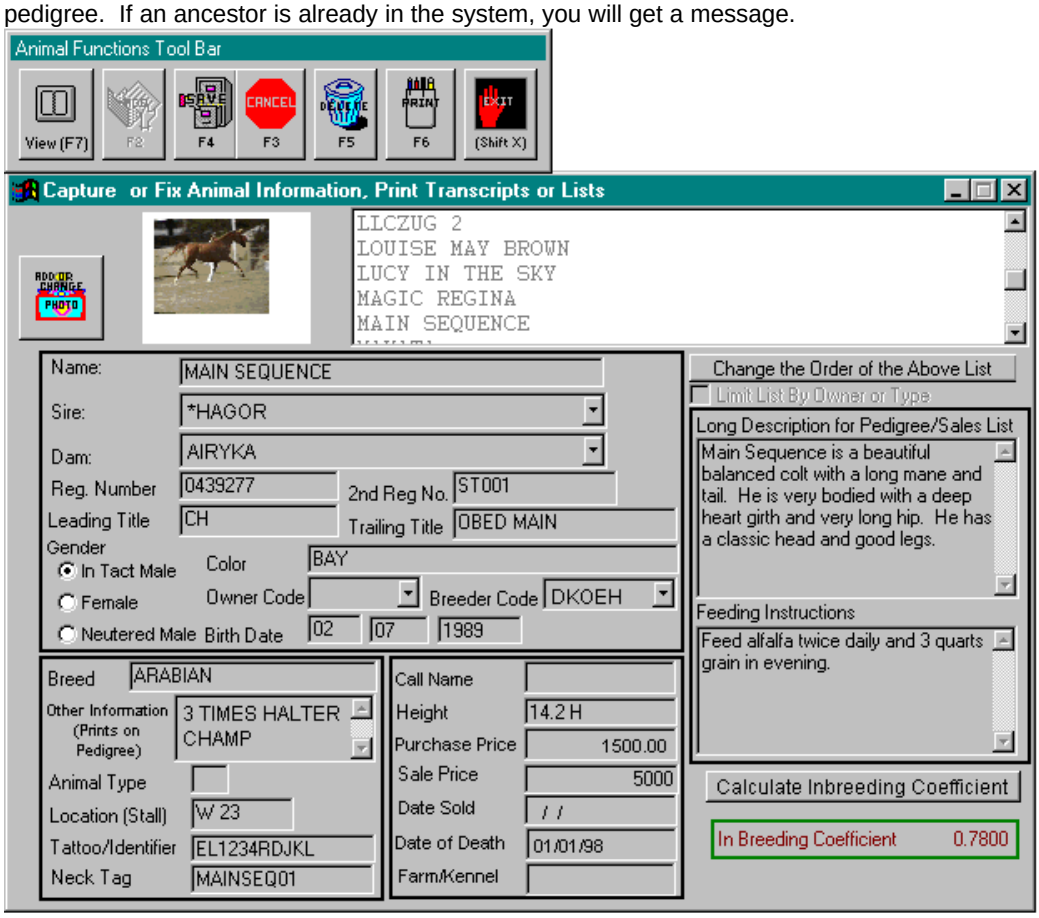
Exit the Program

To Leave the System, Click on FILE then EXIT or QUIT or click on the Control Menu button in the left corner of the title bar and select CLOSE. You can also click on the X in the upper right on the title bar.

Add / Change Animal Data

This screen is used to record the primary information about each animal such as color, registration number, parents, etc. and to set up the “Names” file for the Pedigree Function and for the choices lists on other screens. Refer to the section on ~~using the system~~ to review the basic workings of the Function Window.

Remember, In order for your pedigrees to fill in, you will need to add an animal for each ancestor in the pedigree. If an ancestor is already in the system, you will get a message.



Inbreeding Coefficient

Calculate the In Breeding Coefficient by clicking the In Breeding Coefficient Button after the Animal has been selected from the list or in Add Mode. The Inbreeding Calculation uses 7 generations of data and compares the common ancestors occurring between the sire and dam side. So you will need to enter your ancestors into the system before the Inbreeding Coefficient will have any meaning.

Managing the Animal Lists

Select the Order of the List

You can select the Identifier that will control the order of the List Box by clicking the **Select Identifier button** and then choosing the desired identifier by clicking in the circle next to your choice. Choices are Necktag, Animal Names, Registration Numbers or Tattoos. Whichever identifier is selected, the animal name will also appear for aide in identification. You can return the list to previous selections by clicking the button again. The list always defaults to Animal Name when the screen is opened.

Limiting the Animal List

You can **limit the list** of animals displayed in the list box by Ownership Code or Animal Type or Both. When the list is limited, only the animals meeting the criteria are available for review and editing. Click again to return the list to all animal. The list defaults to All Animals when the Screen is opened

Entering Animal Names in the Parents Fields

When you **Begin Typing** the Male or Female Parent, the Selection List will look for matching names based on the letters you have typed. Or you can drop the Selection List to select the correct Male and Female Parents names. If you enter your reference pedigree animals from right to left from the pedigree sheet, you can use the selection list to improve your accuracy and reduce typing.

Attaching Photos

To attach a photo to an animal, add or select the animal so that the detail entry fields show the animal's record. Click on the Add or Change Photo Button to the left of the list box at the top of the Animal Function Window.

- **Windows:** The Windows File Dialog Appears. Select the File and Click Save. Windows pictures should be BMP or PCX files and your Windows OLE must be able to find the "driver" for the Picture.

- **Macintosh:** Open the Image in your Image Editor (Scanner Software or Photoshop, etc.). Select the portion of the image you want and copy it to the clipboard. Return to Animal*Trac , Click on the Photo Capture window. Select FILE menu / PASTE SPECIAL , select Picture from the choices offered and click Paste. The picture will appear. Click on the left title bar close button. Click on Quit on the Message Window. Photos must be PICT files.

The photo of an animal is automatically shown at the top of the Animal Function Window if one has been attached to the Animal's Record.

Data Fields

- All Name Fields are 35 characters long. The Male and Female Parents names are used to connect the animal to the rest of the animals in his/her pedigree.
- On most versions, you can enter multiple registration numbers each of which is 12 characters.
- The Title Field is 20 characters and is printed in front of the Animal Name on the Pedigree.
- The Other Titles Field is 20 characters long and can contain any additional information you want to print on the pedigree under the name to 3 generations. (Lineal Appraisal scores, star buck and star milker information prints on specific goat versions)
- Birth Date is a 2 character month (number), a 2 character day (number) and a four character year.
- The Height Field is a 6 character field that can be inches or hands or any other combination of characters. The Height prints under the name on the pedigree.
- The Location / Stall Field is 6 characters and should be entered for each animal you own or you have on the premises. It is used to post a medical or service item to all animals in that pasture or barn. Remember to change the location when you move an animal if you want to use the location feature in posting medical and services items to multiple animals. (see page 13).
- The Animal Type Code is a 1 character Field used to specify unique species in your system . You only need to enter this code if you are using the system for multiple animal types and you want to be able to limit your printed and on screen lists.
- The Neck Tag field is 8 characters and is used as an identifier in the Animals List Box in the case of animals where specific names are not immediately know. This entry is not required.
- The Tattoo Field is also an identifier and is 14 characters long. This entry is not required.

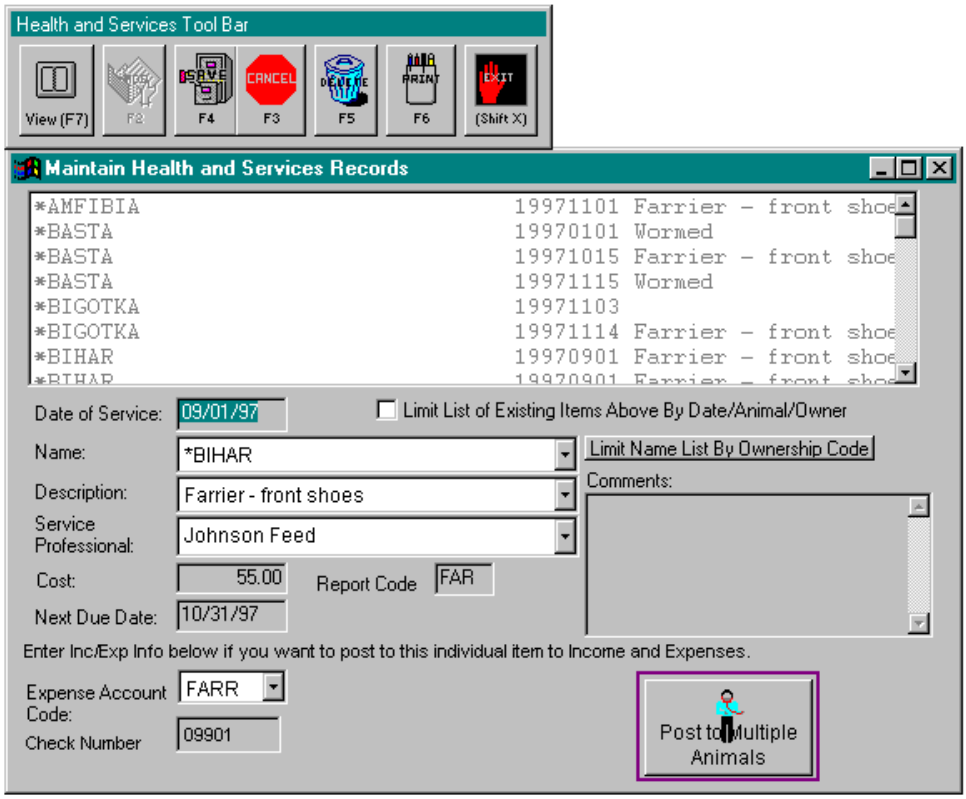
- The Ownership Code has multiple uses. It is used to connect boarded animals to their owners for billing health and services items. It is used to limit lists in list boxes and selection lists to just owned animals. It is up to 5 characters - any combination of letters or numbers. Ancestors entered on the system just for pedigrees should be coded with a special code such as “REF” or “ANCES”. You can set a default ownership code such as OWN for animals you own. When entering Ancestors initially, you can change the default to ANCES and then change it back when appropriate.
- The Description is unlimited in its content and can be printed on the 3 and 4 generation pedigree for animal, parents and grand parents and on the 5 generation pedigree for the animal and parents.
- The Feeding Instructions is an unlimited comment which is used to generate individual stall sheets or a barn list with feeding and handling instructions for the animal.
- Gender is 15 characters.
- Color is up to 69 characters . Color prints on the pedigree under the name to 4 generations.

Special Editions

If you have ordered a Special Edition, there will be a "Special Edition" Button in the Lower Right Corner of the Screen. When you click the button, a new window with information capture fields appropriate to your special edition will pop open. After you have entered the information, click Finished to close the window.

Accessing Health and Services Function

This Function tracks the various health and service procedures by individual animals. Any item imaginable can be saved using this function. You can group your entries by reporting code so that when you print an individual animal transcript it will only include the items saved in that category (for example wormings). You can record the items in your expenses journal by entering an expense code or leave it blank to not record an expense. Professional Only: If the animal has a customer code other than OWN, the item will be listed on the Billable Health Items List as a possible billable item in the Invoicing Function.



The List Box on this screen includes the Animal Name first then the date (year first) and an abbreviated description of the service. The number to the right is a reference number. The list is in alphabetical order by name and then by date within name.

You can limit the items in the list box at the top of the window by clicking your mouse in the check box. You can limit by date range and/or Animal Name and/or Ownership Code. To remove or change the limit, click the check box again.

As you begin typing in the name field the system will start to search the Animal Name “Selection List” for the name and fill in matching entries as you go. If the name you type is not in the list, you will be prompted to add it. At any time, you can click the down arrow to the right of the typing box to drop down the list and select the name you are searching for.

The Description of Service, Provider and Expense Codes boxes are also Quick Fill Lists . As you type in the Description or Provider Name, the system will attempt to fill in the information. If the Provider or Health /Service Choice is not in the Pre-Created List, it will be added.

When the Description Field is highlighted, you can choose a service from the health choices list. The Description, cost and reporting code will automatically fill in and a next due date will be

calculated based on the number of days in the Health Choices List Item. You can type a description that is not in your list but then will need to fill in the cost and reporting code and will also need to calculate the next due date manually. If you select an item from the list and the due date does not correctly calculate or the Reporting Code is wrong, check your Health and Services Choices List to be sure there are not two Items with the same description. If there are, delete one of them or change the description.

When the Service Professional Field is highlighted, as you begin to type, a provider name will be selected from the Providers Selection List. If the Provider is not in the list, the system will prompt you to determine if you want to add it. If you choose to add it, a record will be created in the Providers File for this provider, but no other information will be added for it. You can add additional information about the provider in the Maintain Providers Function.

Enter an Expense Account Code ***only if you want the monetary value of this item to be recorded in the Income /Expenses*** Journal. You can select the code from the drop down Quick Fill List or begin typing to have it autofind. Expense Account Codes are 4 characters.

Services Due Dates

The next due date is the date which determines whether the item will show up on the tickler list of services due. You can manually calculate and enter the date or you can record the days to next service in the Health Choices List. Then when you choose your description from the Health Choices List, the days are used to calculate a next due date. For description of Tickler List See The REPORTS Menu. The Tickler Items will also post to the Animal*Trac Calendar so you can use the report or the calendar to determine when services are due.

Using Reporting Codes

The Reporting Code is a 3 character code which allows you to limit your animal transcript to a specific group of items. So you can get a list of all wormings within a given period of time. If all the items are not showing up on the list, then you probably did not code them with the correct Reporting Code.

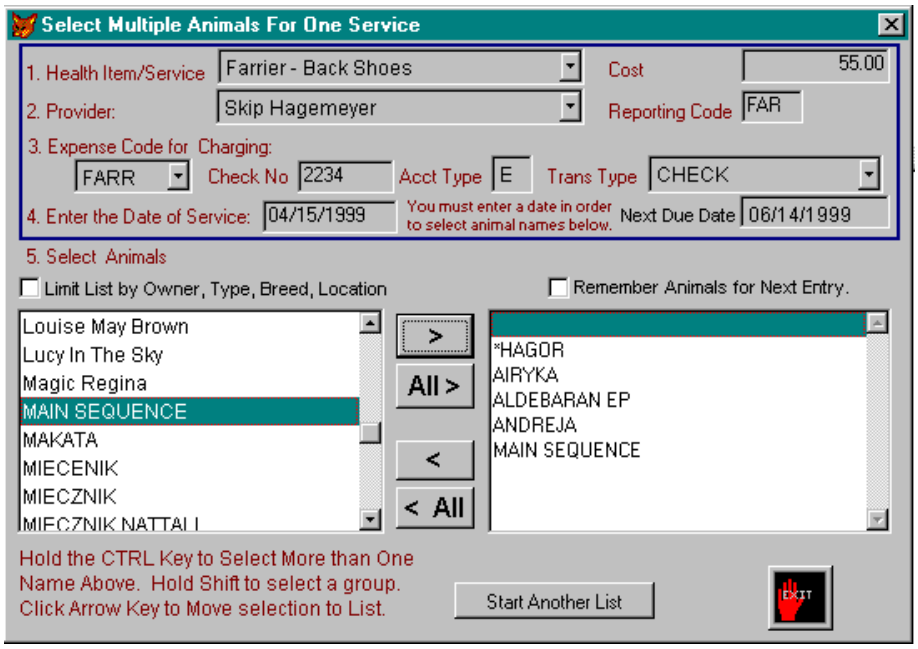
Printing Reports

Reports Available from the PRINT button:

- A complete list of Health and Services Records (limited by date and / or reporting code)
- A Transcript for the Animal currently selected on the screen.
  - This report can be limited by date and/or reporting code and can be viewed on the screen as well as being printed. It also can be formatted so that costs or service professionals or other information can be included or not. You can also specify the order of the list.

Posting Multiple Health Entries

You do not need to make an entry for an animal on the primary health and services function screen (Health and Services). When you click the Multiples Button, you make your entry on the screen which follows.



Type the Description of Service (it will auto fill) or select the description from the list. Make sure the Days to Next Service (for calculating the Next Due Date), Reporting code (for organizing the List of Services) and Cost are entered if you want them and if you didn't get the item from the Health and Services Choices List.

Type in name of the Professional providing the service (will autofill) or select it from the drop down portion of the list.

Enter the Expense Account Code only if you want an item for each animal selected to record in the Income / Expense Journal. You can also enter the Check Number. When you are doing multiple entries, it is recommended that you not use the Account Code / Check number here but rather enter one entry in the Income and Expense Function for the total of the service.

Enter the date that the service was provided. This field is required.

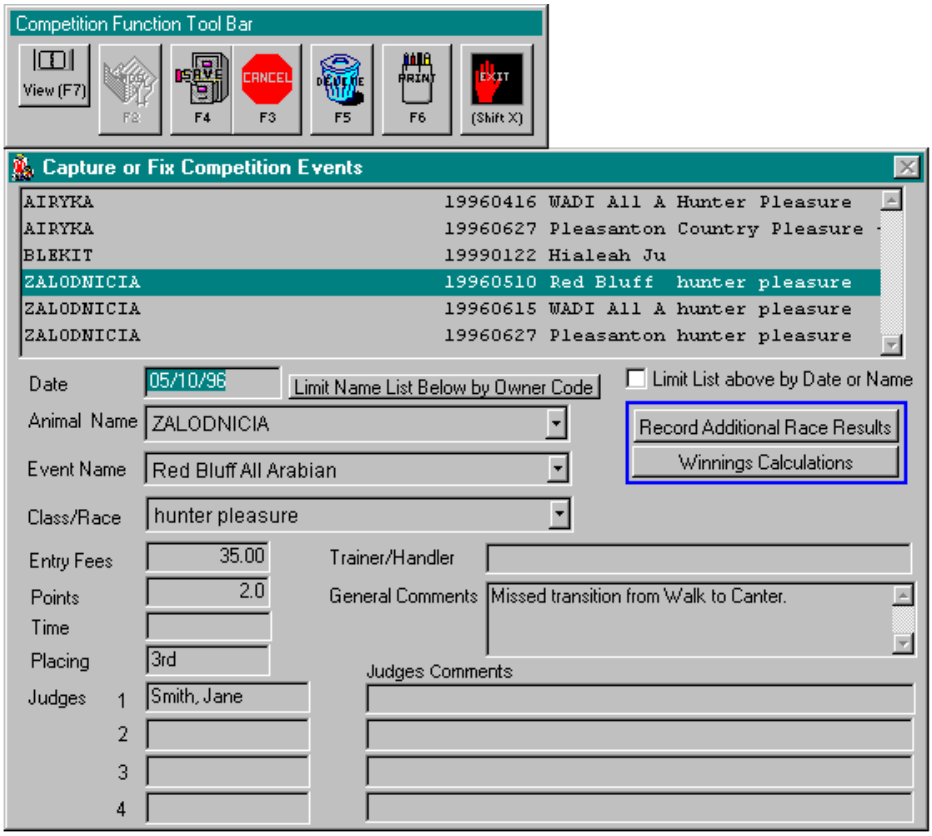
You can Select all Animals at a specific location by limiting the animal names list to that location and then selecting all by holding the shift key and clicking the top and bottom names. You can limit the List of names in the Animal Names Selection List by ownership code. Click on the box and type in the Ownership code. The list defaults to all animals. When limiting the list, the ownership code defaults to OWN..

You can select each animal individually from the Animal Name Selection List by clicking the arrow on the right of the selection list, finding the name and Clicking once on it. Continue to select names until all names are listed in the box below the Selection List.

As you select each name from the list of animals, the health item is saved. **Make sure your list is correct.** If you changed your mind, **delete** the erroneous names from the list by double clicking the name in the list **before exiting or starting another list**. If you accidentally record erroneous records in the Health and Services List, you can delete them by finding them on the primary list at the top of the main Health and Services window, double click the item and click the Delete Button.

Maintain Competition Records

Use this Function to record your animal's successes in the show ring or at the race track.



The list in the Box lists Events in alphabetical order by animal and in ascending date order within the animal name.

You can limit the items showing in theList Box to a specific range of dates or a specific animal name. Click here then enter the dates or click finished to select all dates and then select Name or click No Further Limit. If you want to limit by name enter it in the space provided.

To Limit the List of Names used by the Quick Fill List Box Click the Limit Animal Names Button and type in the Ownership Code to use in limiting the list.

There are now quick fill lists for the Show or Race Name (Event Name) and for the specific Class or Race. These lists are based on shows or races entered before by any animal. If you type in a new show or event or class or race, the next time the Lists are created those items will be in the list.

Click this button to calculate Average Race Winnings over a specified number of starts. You will be asked for the number of starts. Then a screen will be displayed with the Calculated Average $.

The PRINT Button produces:

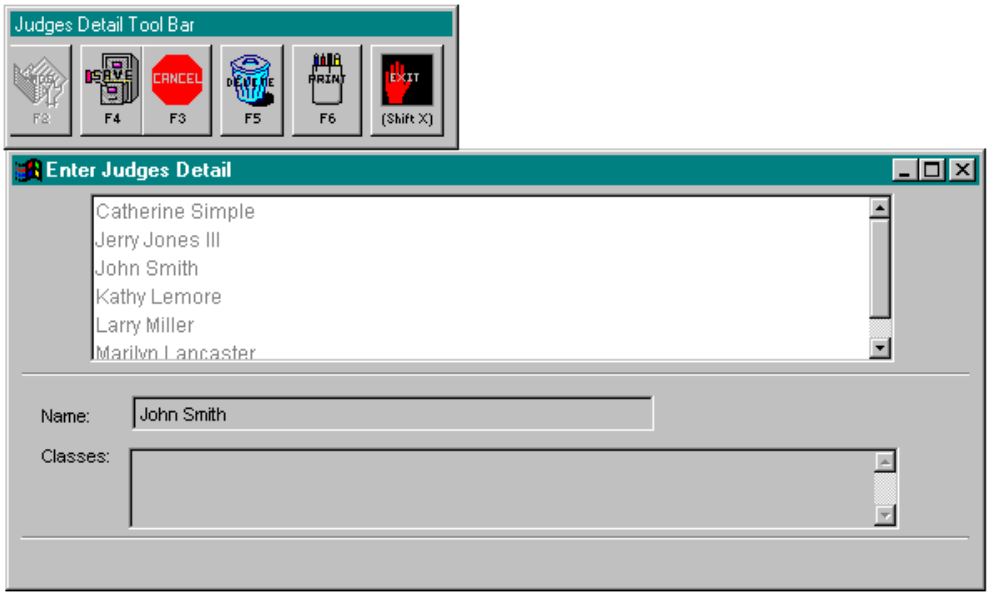
A Complete list of Events Entered (Limited by Date Range)

A Transcript of Events for one animal for any specified period of time.

A Transcript of Race Results for One Animal.

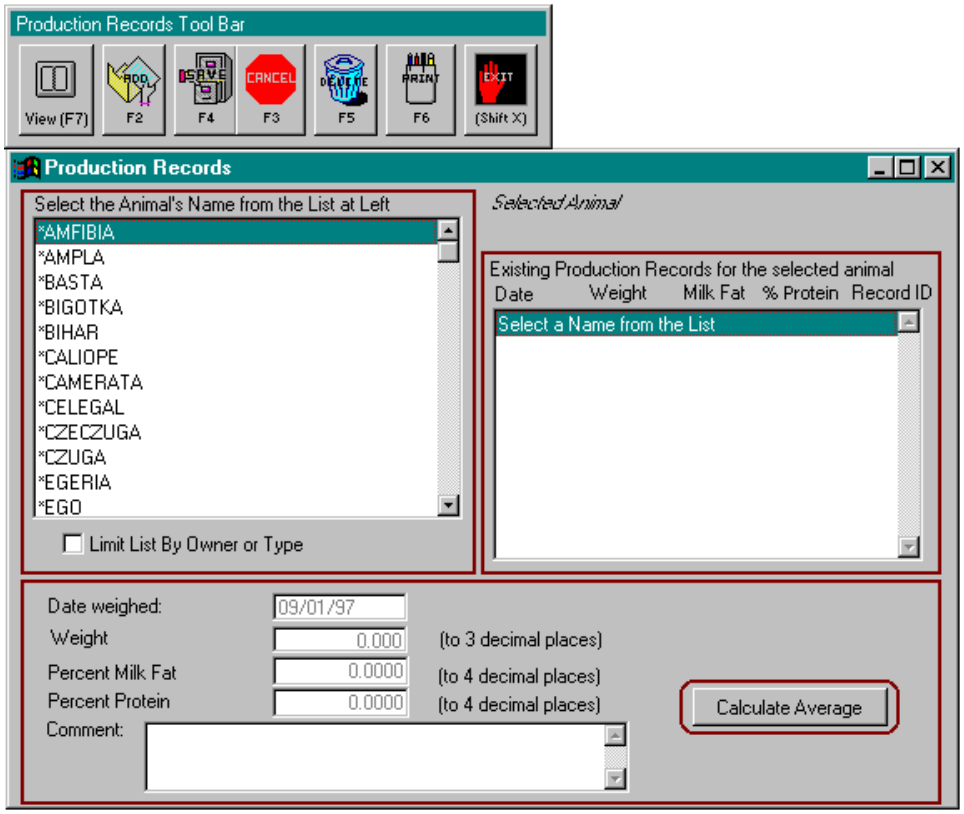
Judges Function

You can keep track of judges and which classes they judge. Click Judges on the Competition Menu



Maintain Production Records

Production records are used to keep track of Average daily weight gain for Meat Animals, or Average Daily production of milk. This function can also be used to track wool or hair production and any other type of production that is used to calculate an Average and rate an animal.



A list of animals is available on the Left of the Window. Double Click the Name of the Animal being Measured. The name will show in the upper right corner to confirm that you have selected the correct name and the list on the right of the window will paint with already entered production records.

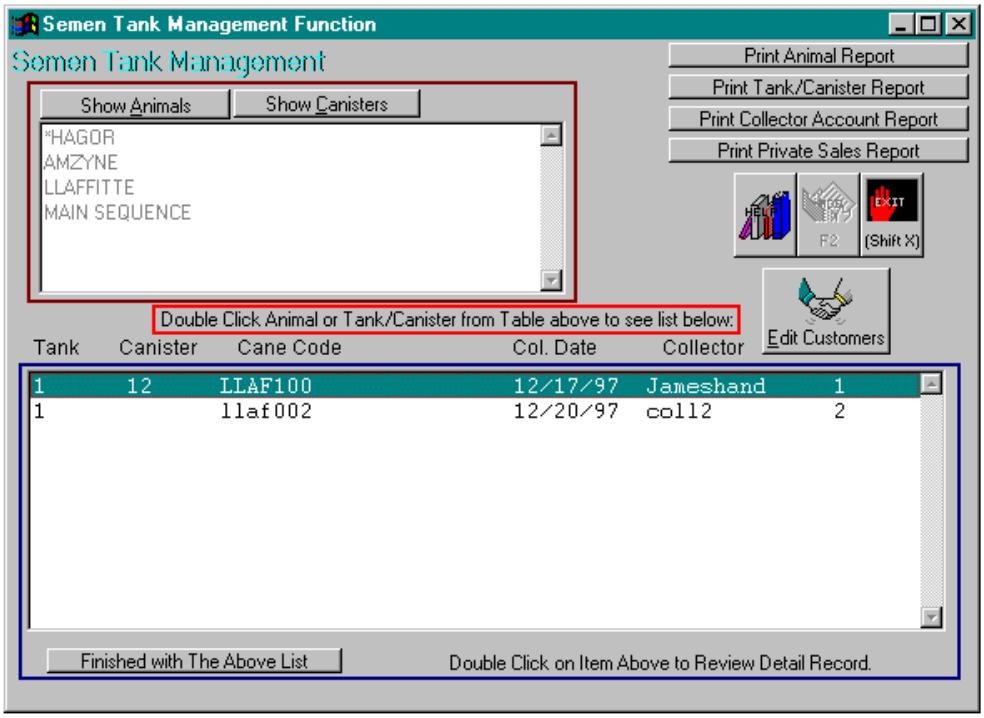
This function uses the standard tool bar functions as on all other screens. (See using the System)
To edit a production record, double click the item in the list. Make the necessary changes and click SAVE.

To add a new record for this animal click the ADD Button on theTool Bar and type the information into the text boxes in the lower half of the screen.

To calculate the Average click the Calculate Average Button. You can choose to calculate from birth or for a date range. The average will show on a screen.

Maintain Semen Tank Inventory

Many Animal Types and Breeds use Frozen Semen Tanks to store collected semen. This Function provides a means for managing the inventory in the tank without having to open the tank and count straws. You can also maintain an inventory of canes held by the collector, and canes sold to customers.
There is a customer database which records sales.



The list on the top left of the Window shows the names of animals or the list of canisters already in the Inventory. Click the Show Animals Button to display the Animals in the tank in the list box, Click the Show Canisters Button to show the canister codes.

Adding Canes

To Add a cane for a male animal, Click ADD Button on the right center of the window. Fill in the blanks available on the detail window that emerges on top of the primary Inventory Window. Click Finished when all details are recorded. You can enter Collection information in this process. You must enter usage information by editting the cane.

Adding Usage Figures, Editing Inventory Totals

To Edit Canes, first double click on the Animal or Canister in the list on the top, left. All canes associated with selected animal or canister will show in the list on the bottom of the window. Double click on the Cane you want to edit or add usage figures to.

Private Sales

When you enter a usage figure in Private Sales, you will be asked to enter the customer entity information for the sale. Click SAVE when finished, then EXIT.

Reports

You can print reports of animals in the tank, canisters, collectors accounts and private sales. Click on the Button which represents the report you want.

Click Here to Show the Canister Codes contained in the tank in the list box.

When you select a name or canister from the list by double clicking, all of the canes related to that name or canister are displayed in the list in the bottom of the screen.

To edit one of the Canes listed, highlight it then double click on it.

When you are finished with the cane list, Click Here.

Editing an individual cane

When you are Editing a Cane Record, You can enter your usage of straws from the tank. You can change the original collection totals. When you record usage or change total collection information, the number in the display area will change.

If you need to delete the cane record, click here.

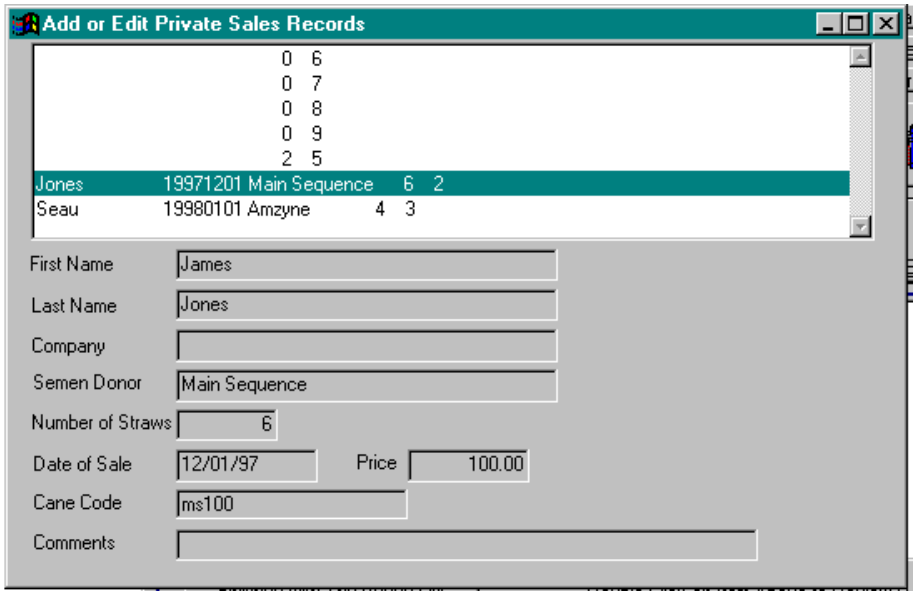
If you need to fix the inventory information that is displayed in the Display Box, Click on Edit Tank Inventory. When the inventory numbers are correct, click on Finished with Inventory Edit.

When you have completed all fields, Click on Finished with this Cane Code to Return to the General Display Screen.

When you add a Cane, the Usage is not available for update. Enter the number of canes collected and the other information and Click on Finished With the Cane Code.

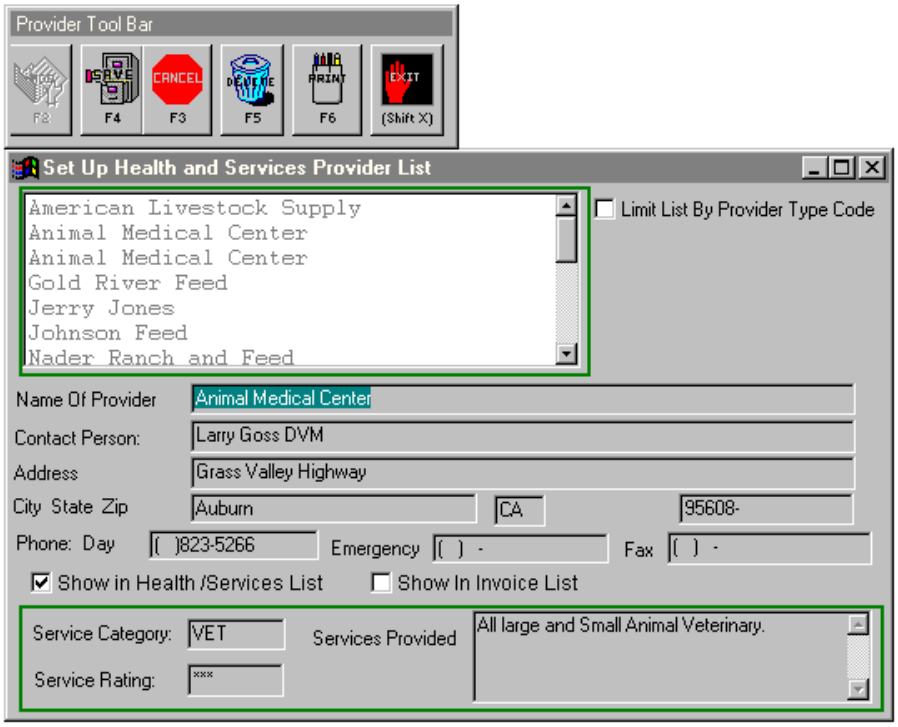
Adding Customers

You can keep track of customers who purchase straws from you or from your collector. Click the Edit Customers Button.



Adding or Editing Providers

You can use the Provider List Function Screen as an address book for people who provide services as well as creating the provider selection list for the Health and Service Screen and the Billing Screen. You can group your providers by 4 character code and then limit the list in the list box on this screen to only those in one category (i.e. Only Feed Stores). PRINT will print a report of Providers in three different formats.



To show this item on the Provider List on the Health and Services Screen, Enter Y here.

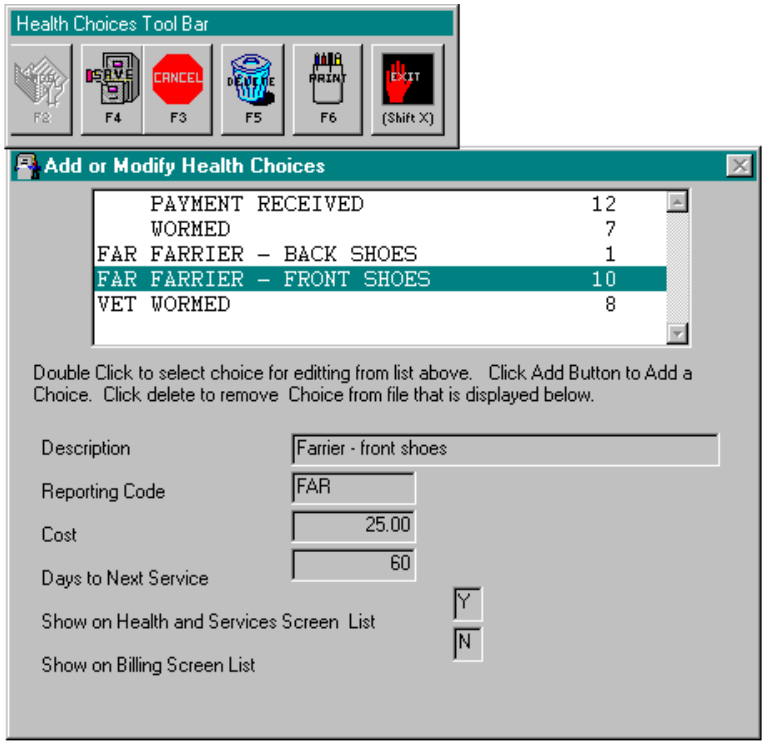
To show this item on the Provider List on the Billing Screen (Professional Version Only), Enter Y here.

You can limit the list in the list box by clicking here, then typing in the provider category you want to display.

Enter your Provider Category Code here. It can be anything, but be sure you are consistent so that when you limit lists, all of your entries will show up.

Maintaining Health Choices

Use this function to Establish and Maintain your list of medical, services and other animal specific items which you record for your animals. This can include vet visits for common procedures, shots, medications, milk records, weight gain records, training or lessons, handling fees, or anything else you can think of. The items appear in the Health Choices Selection List on the Health and Services Function Screen and in the Services Selection List on the Billing Function Screen (Professional Only).



You can add items or change or delete entries at any time. The PRINT Button prints a list of choices.

To Show this Description in the Health Choices Selection List on the Health and Services Function Screen, Enter Y here. Default is N.

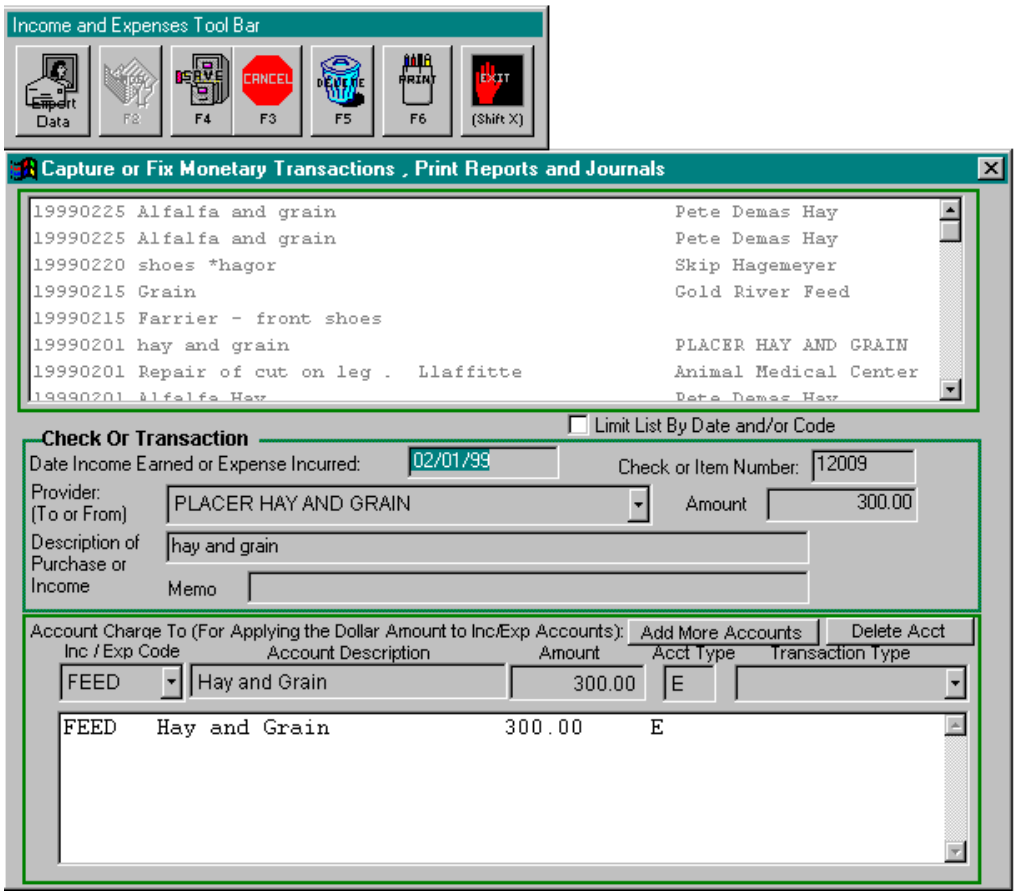
To Show this Descripton in the Health Choices Selection List on the Billing Function Screen, Enter Y here. Default is N. This is only used by the Professional Edition.

The Reporting Code can be used to group like items on the Health and Services Transcripts and lists. A reporting code can be any 3 character code, such as VET or 001. When you enter an item for the list, and assign it to a reporting group, anytime you use that item from the list, the individual health item will be coded for that group and will appear in that group on a "grouped services list".

Be sure to enter your days to next service so that the Next Due Dates will calculate in Health and Services.

Income and Expenses

The Income and Expense Function allows you to keep track of what your business is costing and how much it is making. You define the Income and Expense Categories and by classifying them as Income or Expense, Your Income and Expenditures can print in different parts of the Journal and you can print a report with a bottom line.


Income and Expenses Tool Bar
Export Data
F2
SAVE F4
CANCEL F3
DELETE F5
PRINT F6
EXIT (Shift X)
Capture or Fix Monetary Transactions , Print Reports and Journals
19990225 Alfalfa and grain Pete Demas Hay
19990225 Alfalfa and grain Pete Demas Hay
19990220 shoes *hagor Skip Hagemeyer
19990215 Grain Gold River Feed
19990215 Farrier - front shoes
19990201 hay and grain PLACER HAY AND GRAIN
19990201 Repair of cut on leg . Llaffitte Animal Medical Center
Limit List By Date and/or Code
Check Or Transaction
Date Income Earned or Expense Incurred: 02/01/99
Check or Item Number: 12009
Provider: (To or From) PLACER HAY AND GRAIN
Amount 300.00
Description of Purchase or Income hay and grain
Memo
Account Charge To (For Applying the Dollar Amount to Inc/Exp Accounts):
Add More Accounts
Delete Acct
Inc / Exp Code
Account Description
Amount
Acct Type
Transaction Type
FEED Hay and Grain 300.00 E
FEED Hay and Grain 300.00 E

Items are listed in the list box in descending order by date. You can limit the list by Date Range and or Expense Code. If you want to edit an item, select it in the list at the top then double click on it. If you want to ADD a new income or expense item, click the ADD Button on the Tool Bar.

The Income and Expense Items are entered in the middle section of the Function Window In a format similar to a check. You must include a date. Provider is the name of the person or company to whom the "check" was written, charge was made or from whom the payment was received. The provider box will automatically fill when you begin typing if the provider has been entered in the Provider List. It will automatically be added to the Providers if you type in a new provider in the Income and Expense Function.

To Limit the List Click the Check Box then Select the type of limit you want.

To charge the expense or income to an account, enter the account code and amount and choose a transaction type from the type list . The Account will be added to the list of account splits at the bottom of the screen. If the item needs to be charged to more than one account, click Add More Accounts and type the new information into the boxes. This allows you to split a check or charge over more that one account without double entering the item.

[#]**Exporting Income and Expense Data:**

[#] Export_IandE

You can click the Export Button on the tool bar to send your data to other applications for processing.

When you click the Export Button, you will be asked for a date range for the items to be exported. Enter a Beginning and Ending Date. If you do not enter a date, all of your data will be exported regardless of which year it was in.

You will then select the format for the export. You can Export to Quick Books, to Excel or to Lotus 123. If you export to quickbooks, you will be asked for the Bank Account name to be posted with the transactions.

HELP NOTE: AT THETIME OF PRINTING, THE QUICK BOOKS EXPORT WAS NOT WORKING AS EXPECTED. WHEN THE EXPORTED FILE IS IMPORTED INTO QUICKBOOKS, QUICKBOOKS SAYS THE IMPORT WAS COMPLETE BUT THE TRANSACTIONS DO NOT SHOW UP IN TRANSACTION REPORTS. WE ARE RESEARCHING THIS PHENOMENA WITH INTUIT AND WILL MAKE NECESSARY CORRECTIONS WHEN A RESOLUTION HAS BEEN DETERMINED.

[#]PRINTING INCOME AND EXPENSE REPORTS :

All reports can be limited by date range and can be either viewed or printed.

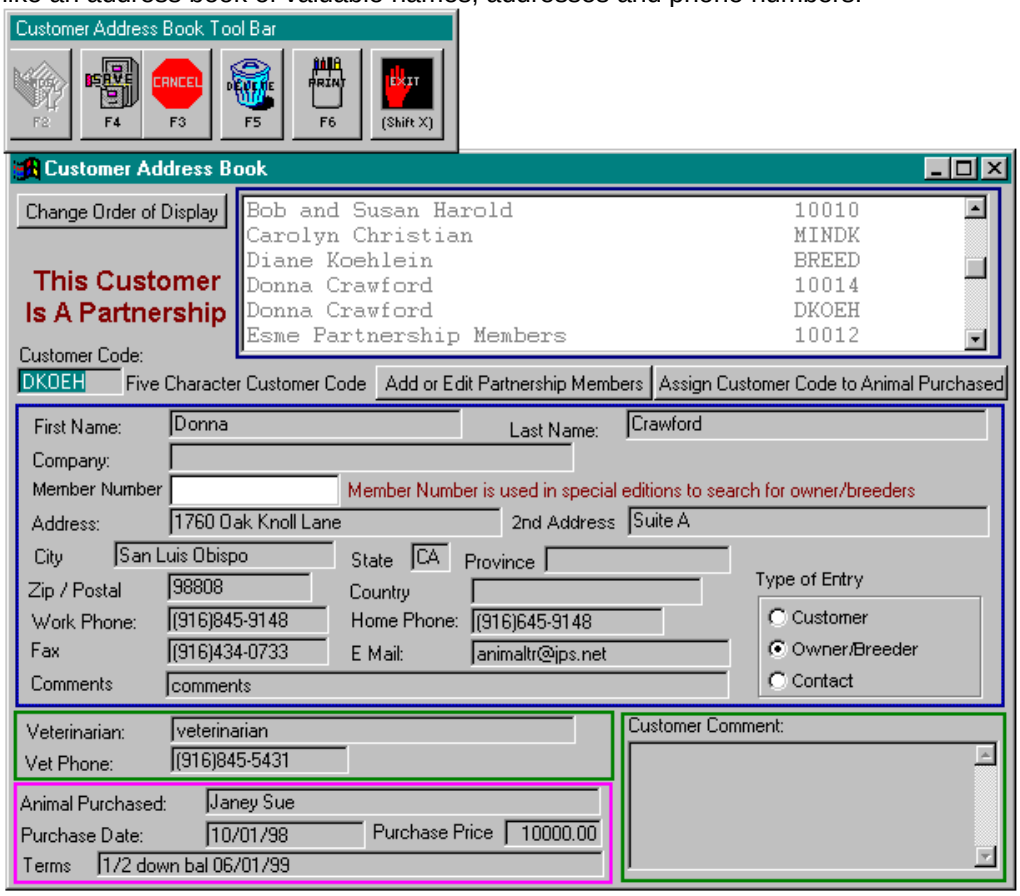
A Journal of All Transactions with Grand Total at End Income minus Expenses.
A List of One Income or Expense Category.
A List of Income Items.
A List of Expense Items.
A Summary Sheet of all Category Totals only

After you print a report, a dialog box will appear on the screen if you have Income and Expense Items in your file which do not have a valid Account Type Code (i.e. I or E). You can choose to view the list on the screen, print it , or not print it. If you get everything cleaned up then the bottom line total on the full journal will be correct .

[#] expense_print

Modify Customers

The customer records are used by the sales function and the Billing Function. The Entries Act like an address book of valuable names, addresses and phone numbers.



The Customer Code is important for connecting the People with their animals. The Code is 5 characters long and can be any combination of characters and numbers. It must be unique to each customer. Customer Codes are used to associate animal health and services records to the customer's invoice for billing. In some special editions, the Customer Code is also used to find names and addresses for the Registration Form or a Breeding Service Report.

Most data on this Function Screen is self explanatory. The Type of Entry designation is used to identify an entry as a Customer (purchaser of an animal), Owner/Breeder (person who is a member of the Special Edition Association and who will be used on the Registration Form or the Breeding Service Report.), or a Contact (a person who may have called or visited for whom you want to record information.

Add or Edit Partnership Members allows you to create a partnership for purposes of billing the partnership and the individual partners.

Add / Edit Partners for Billing

To code this customer as a partnership and indicate the which individual customers are the partners, click here. See Discussion of Partnerships below. (Applies to Professional Version Only)

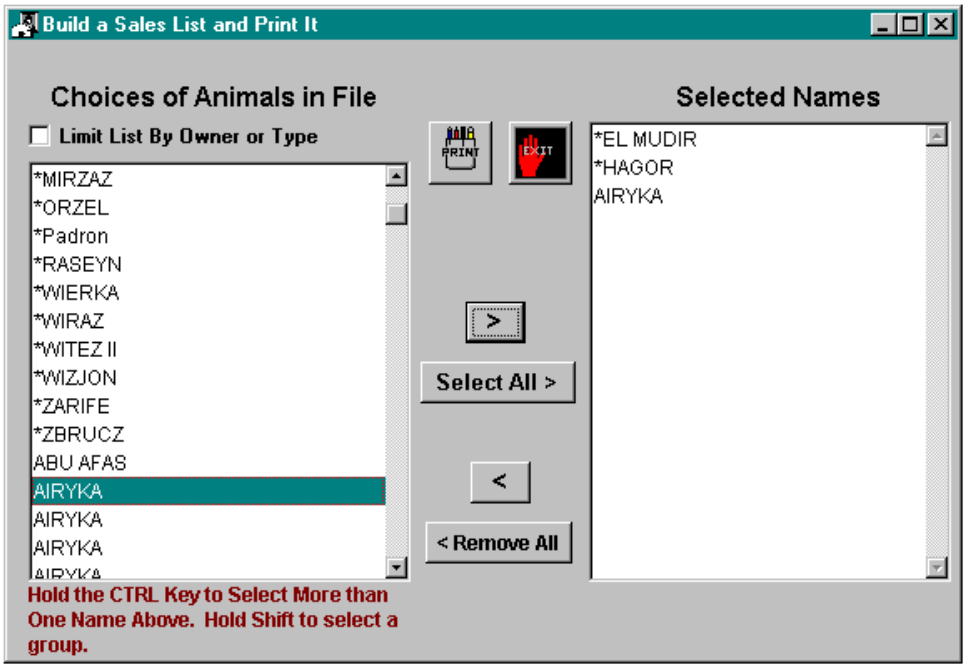
To record a partnership for Billing Purposes, add each individual member as a customer with a unique customer code. Then add a customer record for the Partnership with the correct billing address. This is the address where the invoice will be addressed. Click on the Add or Edit

Partnership Button while the Partnership customer record is on the screen. A new screen will appear where you enter the individual partner's code and the percentage of their involvement. When you are finished you click Finished Recording Partners to return to the Primary Customer Screen. The individuals will be coded as partners and the Partnership will be connected to the individuals.

When you add a customer to your address book, you can click Add the Customer Code to Animal Purchased in order to connect the animal to the owner. You can then later use this information in billing or to print a purchases report.

Sales List

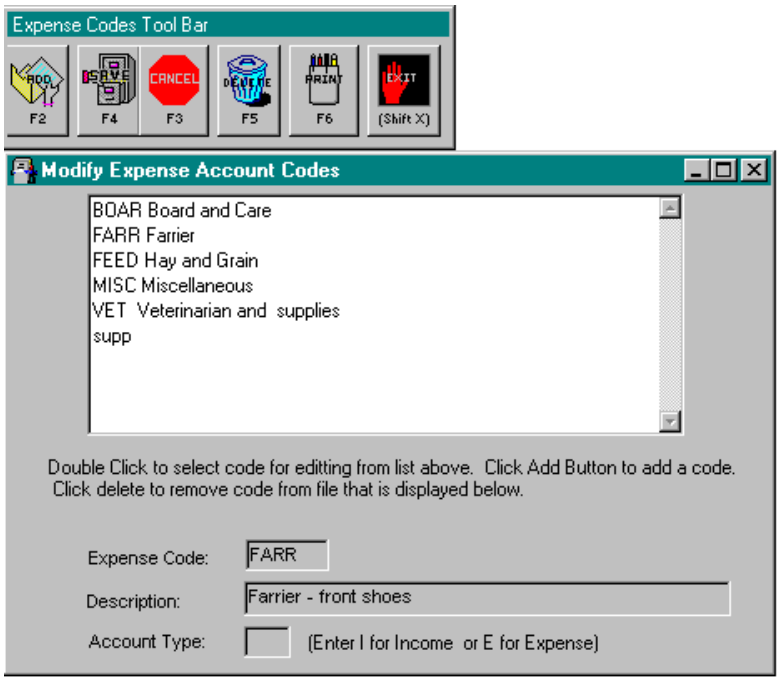
Select the animals to appear on the list from the List Box on the left of the screen by clicking the button with the right facing arrow. The names will appear in the box to the right. You can use the ctrl key to select more than one name in the list. If you want to select a range of names from the list hold the shift key and click the first name then click the last name.



Click PRINT to Print the sales list. You can print it in alphabetical order or as you entered the names. If you make a mistake on the list, you will need to start the list over by exiting and coming back into the Function.

Income/Expense Codes

Your expense codes will be used to organize your Income and Expense Journal into logical groups. You can set them up any way you want. If you change a code in the list, the system will not go back to all the income or expense items that currently have that code and change it. So give it some thought before you start using the codes. If you do decide to change a code, it is not difficult to go back and change the codes in the items where they were used.



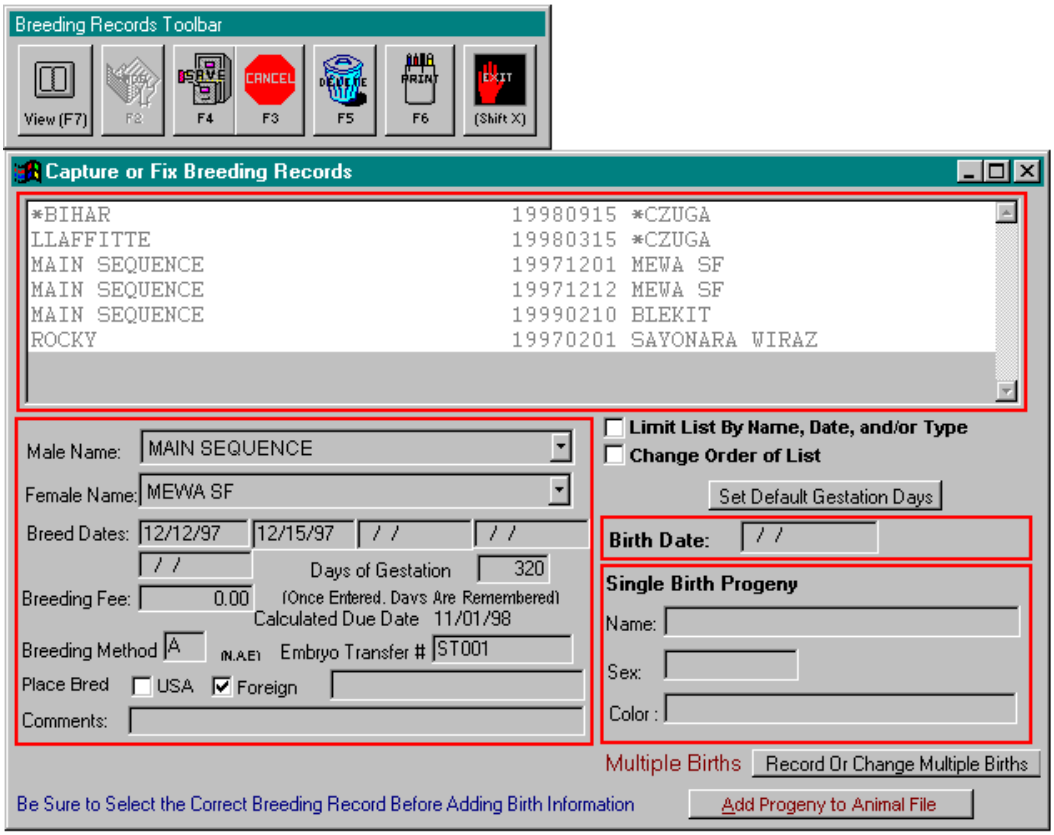
Be sure to Code as E or I to represent Expense or Income Category.

Create your own Income and Expense Codes. It is suggested that you choose codes you can remember and that fit in with your business tax structure and accounting practices. The Code is 4 characters long.

PRINT generates a report of Income and Expense Codes with their descriptions.

Maintain Breeding Records

There are two elements to the breeding functions offered. The Primary Breeding screen accessed by Add/Maintain Breeding Records is used for recording information about the pairing of animals. The other Breeding Related Function is a detailed ~~Breeding Chart~~ which records detailed activity of Female Animals.



You can change the order of the list at the top by clicking the Change Order of List Box. You can order the list by the Male Animal or by Female Animal. You can select from the list by double clicking the item in the list.

You can limit the list by Animal Name or by Date Range. Click the Limit List Check Box then enter the date range or leave blank to see all dates. Then Click to select Animal Name or Type or No other limit. If you select limit by animal name you will be asked to enter it. To change the limit, click the box again.

When you enter the Days of Gestation the first time, it will be remembered each time you add a breeding record. If the female animal you're breeding normally goes longer or shorter, change the days on her breeding record and the new days will be remembered and the Due Date will be calculated using the new days. The default will still by the Gestation days you set before.

The PRINT Button Produces:

All reports can be limited by a beginning and ending date and the transcripts can be viewed on the screen or printed to the printer.

List of all Breeding Records in File.

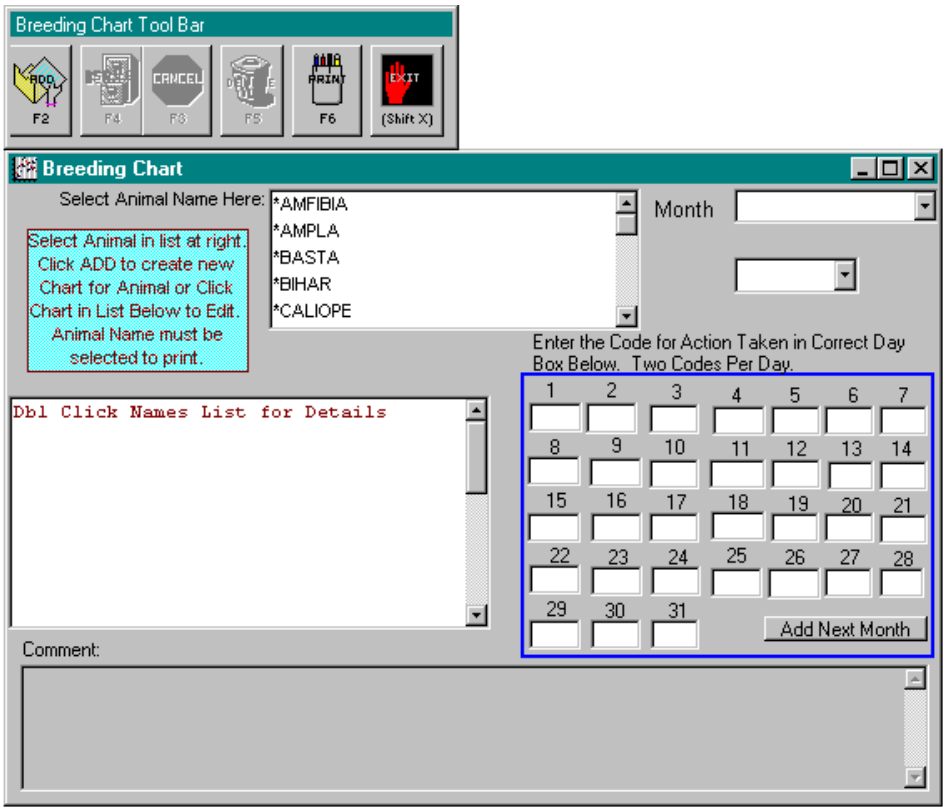
A Breeding Transcript of all Pairings with the Male Animal currently Selected in the Detail.

A Breeding Transcript of all Pairings of the Female Animal currently Selected.

List of Bred Animals by Due Date for a "Due Date" period.

Detail Breeding Chart

You can record the behavior and breeding activity of female animals using the Breeding Chart Function. The Printed Chart for an individual female animal will show all months which fall within the time period requested.


Breeding Chart Tool Bar
ADD
F2
CANCEL
F3
PRINT
F6
EXIT
(Shift X)
Breeding Chart
Select Animal Name Here:
*AMFIBIA
*AMPLA
*BASTA
*BIHAR
*CALIOPE
Month
Select Animal in list at right. Click ADD to create new Chart for Animal or Click Chart in List Below to Edit. Animal Name must be selected to print.
Enter the Code for Action Taken in Correct Day Box Below. Two Codes Per Day.
Dbl Click Names List for Details
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31
Add Next Month
Comment:

Select the Female's name from the list at the top of the Function Screen by double clicking the name in the list. If a Female's name does not appear in the list, check the "Gender" on the female's animal record to make sure it is "Female"

If you are adding a new month, click the ADD button then select the month out of the month drop down list and the year out of the Year List. If the year showing is correct, you still need to click on it to get to the detail days boxes.

After you have finished with the current month's record, you can continue into the next month by clicking the **Next Month** button. If you already have added the month, this button **does not bring up the next month.** You can select the next month from the list at the left center of the window.

You can use any codes and you can record 2 characters in each box in the Days Section. There are no pre programmed codes so you can use any characters you want.

Click Print to print the teasing charts. If no animal is selected, you will be asked to enter the Animal Name. You will then be asked for the Range of Dates to Print. For only one year, enter the same 4 character year in both fields. You can view the chart on the screen or print it to the printer.

If you need to delete a month for an animal, double click on the month to delete in the left hand list box. Then click DELETE on the tool bar and confirm the deletion.

When you have completed the chart, click SAVE.

In Breeding Calculation

The inbreeding coefficient is based on the Wright's Formula for Inbreeding Calculation. It compares the occurrence of the same animals in the sire line and in the dam line. When you select the animal's name, each inbred animal is shown with a percentage and the overall coefficient is displayed on the bottom.

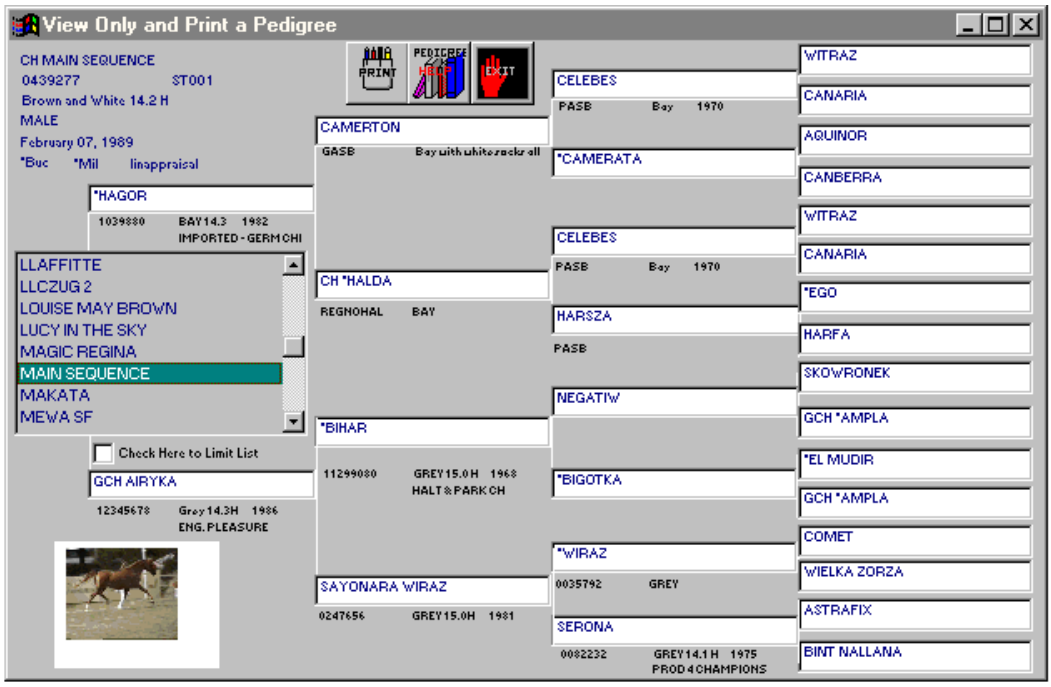
This number will be saved and recorded on the Add / Fix Animals screen each time you enter the function.

This Coefficient will be stored in the Animal's Basic Record and will display on the screen whenever that animal's Information Record is accessed. If you want to review the individual inbreeding, click the Inbreeding Coefficient Button again. You can Print the list of inbred animals and the coefficient by clicking the Print Button.

Pedigree

The pedigree is actually created by adding an animal record with the name of the male and female parents for each animal in the ancestry. You add animals in the ADD / FIX ANIMALS function or in the New Capture Animals Pedigree Format.

You can choose to view the resulting pedigree on the View Only and Print a Pedigree Function screen (First Menu Item on the Pedigree Menu).



The Title is Placed in Front of the Name in each generation.

Underneath the name, various information will be listed from the animal record, including Registration Number, Color, Height, and other titles and information. In special editions, information unique to the breed will print. In the screen format, some of the information may not be complete due to available space, but it will print correctly on the printed format.

Double Click on the Name of the Animal you want to view in the box in the center of the Function Window. To scroll through the list, type the first character or two of the name you are looking for and the list will scroll to the first animal that starts with those letters. Then use the up down arrows to scroll to the one you want. When you double click, the pedigree will appear on the screen.

You can limit the list in the Box to a specific ownership code. Click in the Limit List Box, then type in the ownership code to use as the Limiter.

The photo of the animal shows in the display box at the bottom left of the Function Window.

[#]Figuring out why the Pedigree does not fill in.

If the pedigree does not display all of the generations you know you entered, check the spelling of the male and female parent's name in the animal prior to the last generation which is showing. An extra space or a small 'l' (L) typed as a '1' (one) or a other unnoticeable differences might be causing the problem. The best solution is to access the animal record one generation before, and select the male and female parents' names from the Parents Choices List. Then you can be sure the spelling is accurate. If the male and female parents names are not on the Parents Choices List then you need to add them to the system using the ADD Button or you may have limited the Parents Choices List and you need to remove the limit.

Printing the Pedigree

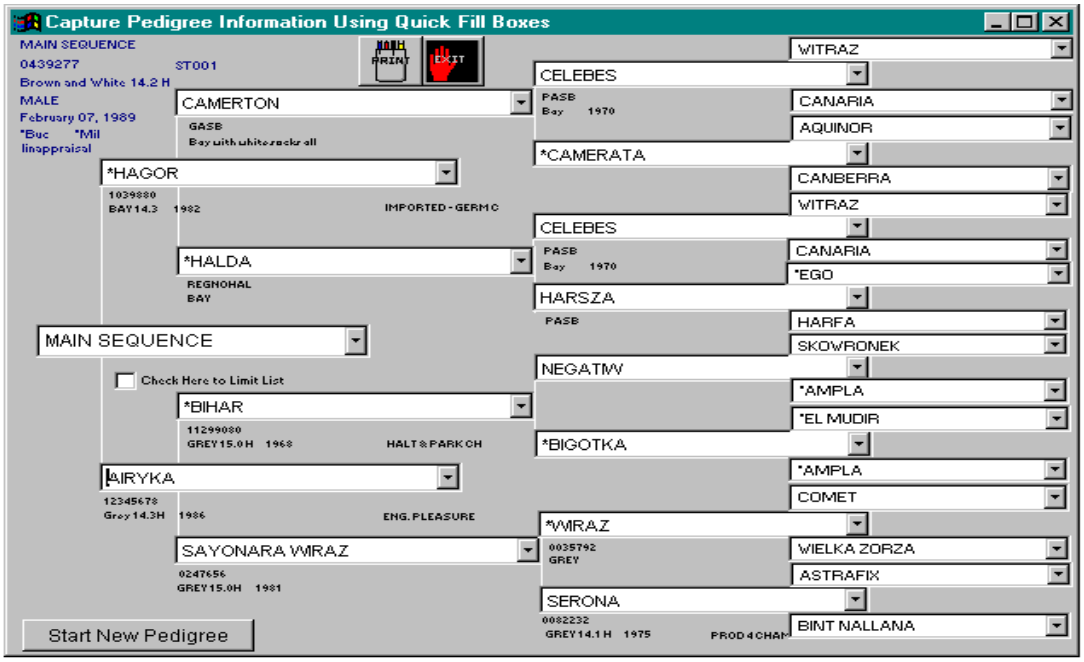
PRINT allows you to select 3 or 4 generation printed pedigrees. The 3 and 4 generation print on 8.5" X11" paper in portrait mode. The 3 and 4 generation pedigrees print comments to 2 generations and 2 lines of detail to 4 generations.

The photo can be printed on the 3 and 4 generation pedigree. You can also print a 5 and 6 generation pedigree which includes comments on the first generation only, prints in Landscape mode (sideways on the sheet), and has detail under the names to 3 generations.

Add Animals Using Pedigree Format

When you select the second menu item on the Pedigree Menu, you will get the Pedigree format that allows you to actually add animals in the pedigree format. Each of the typing boxes has a list of all existing animals attached to it so when you start typing in the box, the system will attempt to find the name and fill in the box.

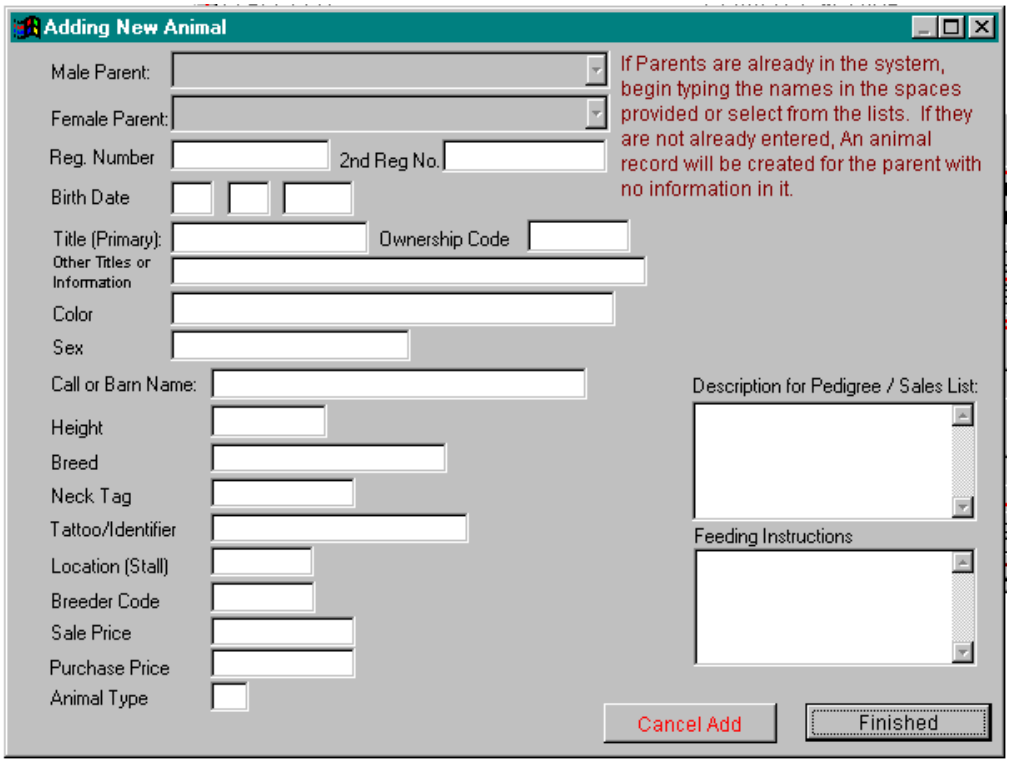
One Caution: When you have a lot of names in the animal list, you might find that this function works very slowly. If this occurs, you should Just add new ancestors in Add/Fix Animals and view and print the pedigrees from the alternate function window (Menu Item 1 on the Pedigree Menu).



This Pedigree function operates the same as the other Pedigree Format for viewing and printing. The primary difference is that here you can actually type names into the boxes.

[#] Doesnot_fill_in

If you type in a new name, the system will prompt you to fill in the additional information for that new animal.

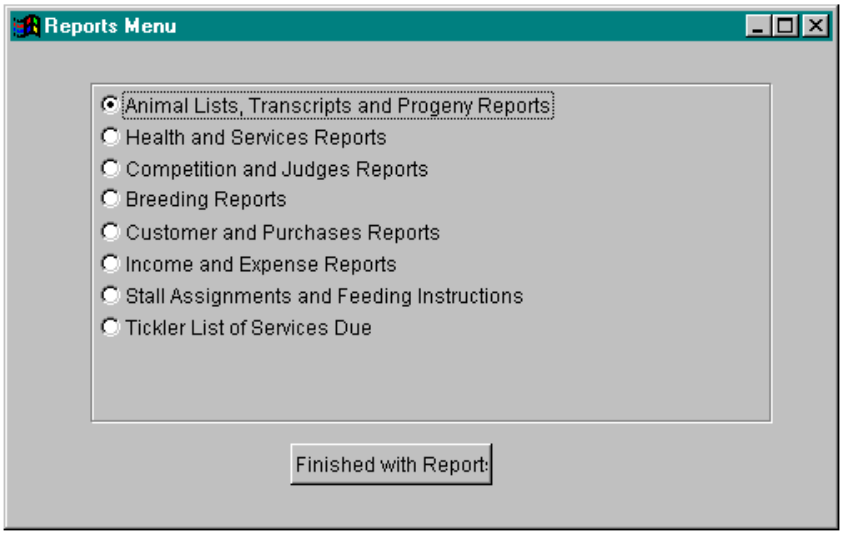


The above format is the Function Screen you get when you add an animal from the Pedigree Function. You can enter the information for the new animal here and then click finished.

Reports Menu

Almost all of the reports on the reports menu are available on the individual screens to which the report applies. Select the PRINT Button on the screen to get a list of available reports.

After you have printed the reports you want, Click the FINISHED Button to return to the main menu bar.



[#]Lists of Animals in File

You can choose to print the entire list of animals (limited by ownership code) or a transcript of a single animal. For the transcript, you will need to enter the name of the animal to print. Then press enter.

[#]Health Transcript Reports

You can print a list of all health services or a transcript for one animal. For one animal, you will need to enter the name of the animal to print. All lists can be limited by date range.

[#]Competition Events

You can print a list of all events or a transcript for one animal. All lists can be limited by date range.

[#]General Income and Expense Reports

You can print the Journal of all Income and Expense Items or a list for one account. The list of reports available from the PRINT button on the Income and Expense Screen is more comprehensive.

[#]List of Customers

[#] List_of_animals
[#] Health_Lists
[#] Show_lists
[#] Income_expense_Lists
[#] Customer_list

You can print a list of all customers or a transcript of customer name which you enter.

[#]**Breeding Records Reports**

You can print a list of all breeding records or a transcript for one male or female animal whose name you must enter on the query screen.

[#]**Progeny List** (List of Offspring for a Single Male or Female Parent)

Click on the radio button next to the report name. Enter the Name of the Animal for which the list will be made. Indicate whether the animal is a male (M) or a Female (F). Press Enter. A list will print of all offspring in the file matching the parent's name.

The following reports are not available from other screens.

[#]**Tickler (Reminder) List of Services Due**

This is the List of Medical or Services Due during a specific time period. Click on the round circle (radio button) next to the single selection. You will be asked to enter the beginning and ending date of the list. After you have entered the dates, the list will print with the animal's name, the date of last service, and the service provided. You can request this list for any time period at any time.

[#]**Stall / Pasture Assignments and Feeding Instructions**

You can print any of the following reports:

One Page per Animal.
All animals in a list by location assignment.
All animals in order by Name.
All animals in order by Ownership Code.
Print a single sheet for one animal. (You must enter the name of the animal).

Click Finished when you have completed printing.

[#] Breeding_reports_1
[#] Progeny_list
[#] Reminder_List
[#] Stall_ass_list

Prepare Invoice for Billing (Professional System Only)

Use this Function Window to complete your Billing Information and View and Print Invoices.

Capturing Information

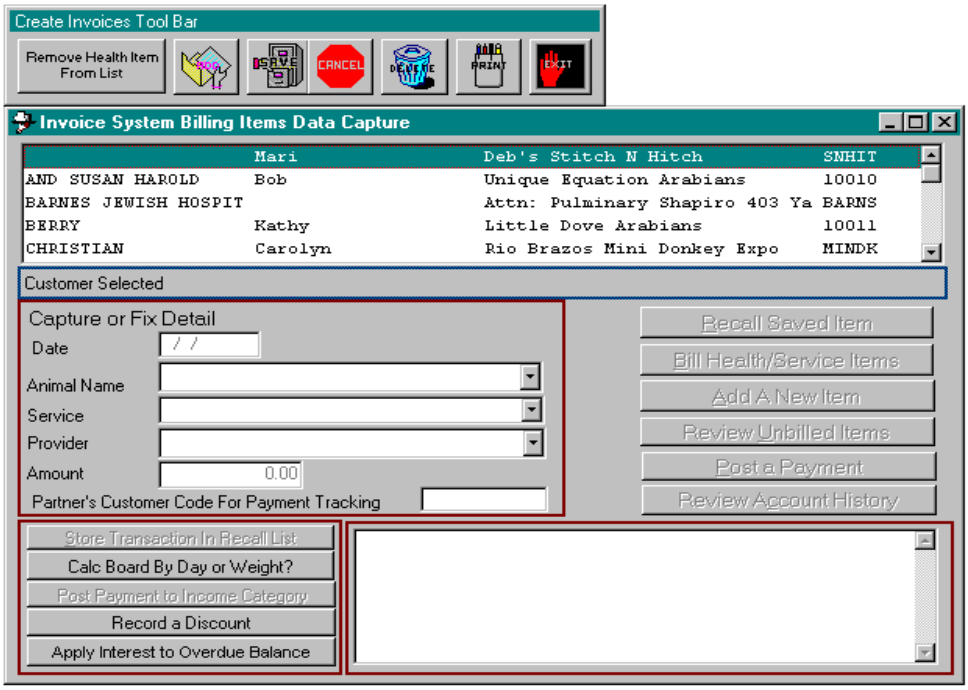
Double Click on the name of the customer you want to bill in the list at the top of the Function Window. The name will appear next to “Customer Selected”. When you have finished with this customer’s bill select another customer from the list to begin a new bill.

The animals belonging to this owner will automatically be available in the Animal Name drop down box (In order for this to work, you need to have coded the Animal's Ownership Code with the Customer's Account Code).

Your Health and Services Choices will populate the Service Typing box dropdown.

Your Provider List will populate the Provider Drop Down Box.

You must always save the items you work on if you want them to appear on the bill. Click here to save the detail which is displayed on the left.



Lists from the Recall Saved Item Button and Bill Health and Services Items Button appear in the list box in the lower right. To select an item from the list double click on the item. The detail will show in the fields on the left for editing and then saving.

If you click Review Unbilled Items Button, you will actually see the invoice information. You can print this individual invoice from the Review Unbilled Items Function.

Adding Items for Billing

To add items for billing Click the Add an Item on the Button Bar on the right of the Function Window. The typing boxes will change color so you can type in them and the date will fill in. (If the date is not "today's date" then your computer system date is incorrect. To fix it click on Start, Settings, Control Panel, Date/Time.) Type in the information and then click SAVE.

Saved Repetitive Transactions

To Save items Which you use every month for a customer, Click on the Store Transaction In Recall List Button when the transaction is still in the detail typing boxes on the left. This procedure puts the item on the list which is displayed when you Click on Recall Saved Item.

To select an item from repetitive transactions that you have saved for recall, Click the first button on the stack. A list of saved items will appear in the box on the lower right. To select an item from the list for billing, double click on it. The current date will appear in the Date Fields. The rest of the information is presented for editting. Then click the SAVE button to save the item on the bill

Bill Health and Services Items

To view items which have been sent to Billing from Health and Services click the second Button on the Stack. A list of items which might be billable will appear in the box on the lower right. Double Click on an item to show it in the detail typing boxes then click SAVE to add it to the bill. If the service is not billable, you can click on the **BIG DELETE** button to mark it so it won't show on your billable items list any more. This process only deletes the item from the Billables List. It will still print on the Health and Services Transcript.

Add an Item

To add a new item to the bill, Click on Add An Item (third button on the Stack) and type the information about the item in the detail typing boxes on the left of the Function Window. As you type, the Animals Names List will auto-fill in the name, the Services List will auto-fill in the description, and the Providers List to auto-fill in the Provided By field.

Post a Payment

To post a payment, click here. Fill in the date and the amount of the Payment. If you want to record the payment in an Income Category, Click on the **"Post Payment to Income Category" Button** while the payment is still in detail fields. You will be asked for the Income Category Code to Charge To.

[#]Review Unbilled Transactions (Review the Current Invoice)

[#] Review_Unbilled_Items_1

You can review unbilled transactions for this customer if you click the Fourth Button. The ~~Review and Print~~ Invoice Function Window is displayed with only the invoice for the current customer. You can print the invoice from this function and mark it as billed if desired.

Partnership Payments

If you are billing a partnership and an individual partner has sent a payment, you should record the payment to the partnership and put the partner's customer code in the Partners Code for Payment Tracking typing box provided on the detail section below the Amount Typing box.

Calculating the Amount

When the Amount Field is highlighted, you can click on the "Calc Board By Day or Weight" button to calculate an amount. You will be asked to enter the number of days (units) to apply the rate to and the rate to use (i.e. $ per unit). The program will calculate the value and place it in the amount field (i.e. 20 days @ 7.00 per day = $140.00)

Record a discount

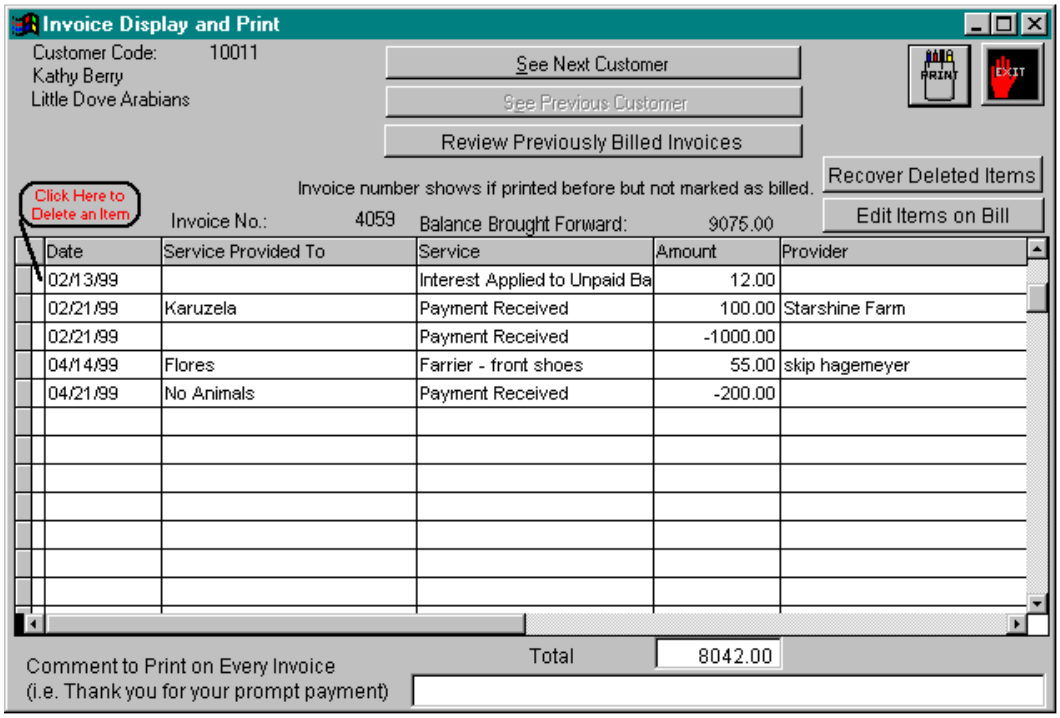
To record a discount, click the "Record a Discount" Button and enter the amount of the discount (decimal figure representing the percentage) and indicate whether you want it to show on the next invoice or just reduce the account balance silently.

Review Account History

You can review the account history of the selected customer. Click on the Last button on the stack. To select an item for rebill from account history, double click on it in the billed items list box on the ~~account history~~ screen.

Review and Print Invoices

You review all unbilled invoices here and print them one at a time or all at once. When they are finished printing, you will need to decide if they are correct and then mark them as billed or say no you want to print them later. When you mark them as billed they will no longer appear in the Review Function.


Invoice Display and Print
Customer Code: 10011
Kathy Berry
Little Dove Arabians
See Next Customer
See Previous Customer
Review Previously Billed Invoices
PRINT
EXIT
Recover Deleted Items
Edit Items on Bill
Invoice number shows if printed before but not marked as billed.
Click Here to Delete an Item
Invoice No.: 4059
Balance Brought Forward: 9075.00
Date | Service Provided To | Service | Amount | Provider
02/13/99 | | Interest Applied to Unpaid Ba | 12.00 |
02/21/99 | Karuzela | Payment Received | 100.00 | Starshine Farm
02/21/99 | | Payment Received | -1000.00 |
04/14/99 | Flores | Farrier - front shoes | 55.00 | skip hagemeyer
04/21/99 | No Animals | Payment Received | -200.00 |
Total
8042.00
Comment to Print on Every Invoice
(i.e. Thank you for your prompt payment)

Name and Address of Customer shows at the top left. If there is a blank line on the display, that means no information has been entered there (for instance Company Name or a second address). The blank line will not print on the invoice.

Move through the invoices by clicking on “See Next Customer” and go back to previous Customers by clicking on “See Previous Customer”.

You can print a comment on the bottom of every invoice by typing it in the box on the bottom of the screen. Here you can notify the customer of when payments are due or just thank them.

The Invoice items appear in a changeable grid in the bottom half of the Function Window for each customer.

Changing an Item

If you need to Fix an Item you see in the changeable grid, click on the rectangle where the data needs to be changed and type the changes. Sometimes you will need to scroll the list of items to see the change take effect.

Deleting an item

If you need to delete an item from the bill, click in the thin box immediately to the left of the time. The box will turn black. This means the item is marked for deletion. When you scroll the list or move off of the customer invoice and then come back, the item will be removed from the list.

Reviewing Invoices Already Billed

If you need to review an invoice that has already been marked as billed, Click Here. You refer to the prior invoice by invoice number so it is important that your invoice numbers be unique. Click on the "Look At Already Billed Invoice" Button and enter the Invoice Number. (If the invoice is not unique, extra stuff will show up on the screen.) If you need to recall the invoice for rebilling, click on the "Recall the Reviewed Invoice for Rebilling" Button while the invoice is still on the screen. The recalled invoice will be added to the unbilled invoices and appear on the screen. The account status will be adjusted to reflect the reissue of the invoice.

If you have printed the invoice before, it was already assigned an invoice number. That number will show next to Invoice Number.

The detail which will be printing on the invoice shows on the screen.

Remember that when you Mark the Invoice as Billed, that is when the account balance is calculated. So payments posted on this month's invoice will reduce last month's balance due. And payments posted on last month's invoice reduced the balance from the month before. The balance owing is calculated each time you mark an invoice as billed and is based on all items billed and all payments received in the history of the account. If you do not mark an invoice as billed, the items on that invoice will continue to show up on subsequent invoices. This will get you in a lot of trouble if you mail the invoices out. So before you mail, Mark As Billed!

Printing Invoices and Journals.

When you click PRINT you can choose to print all of the invoices or just the one currently on the screen. When the invoices finish printing, a journal of invoice transactions prints for each customer. This is a list of the items which appeared on the bill. If this is a Partnership Billing, an invoice report for each partner will print before the Journal. You can print an extra copy of the invoices for your file before you mark them as billed.

After the invoice(s) print, you will be asked if you want to Mark them as Billed, No Print again later, or Print another copy.

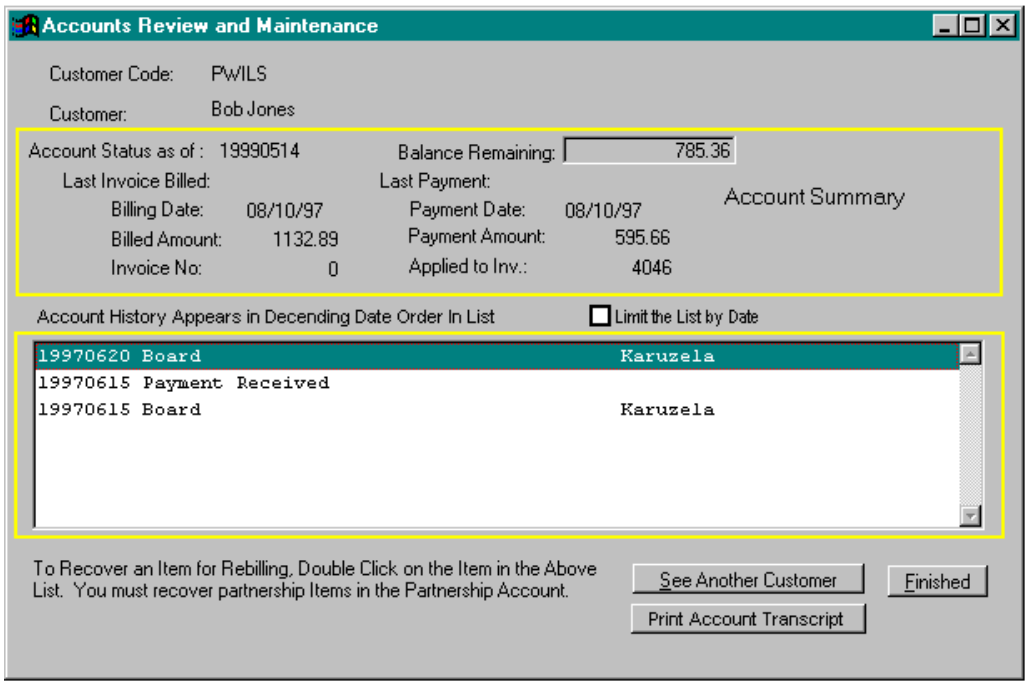
Make your selection and the system will either mark the items on the bill as billed or will print another copy. Once you have marked an invoice as billed, the customer account totals will update, and the items will be added to the billed list. To recover thenReview Account Statusor click Review Previously Billed Invoice on this Function Window and type in the invoice number.

Review Accounts and Recover for Rebill

You use the same screen for a number of account related items. They are:

- To review the account status, (Menu Item 5 on the Billing Menu)
- To recover a billed item for rebilling, (Menu Item 4 on the Billing Menu)
- When you select Review Account Status on the ADD OR EDIT BILLABLE ITEMS Function Screen (see page 7-1)

On the first two uses, you are asked first to enter the customer account code (the 5 character customer code). Enter the code and press ENTER. The account maintenance screen will appear. When you are accessing account status from the Billing Function Screen, the system already knows the customer code.


Accounts Review and Maintenance
Customer Code: PWILS
Customer: Bob Jones
Account Status as of : 19990514
Balance Remaining: 785.36
Last Invoice Billed:
Billing Date: 08/10/97
Billed Amount: 1132.89
Invoice No: 0
Last Payment:
Payment Date: 08/10/97
Payment Amount: 595.66
Applied to Inv.: 4046
Account Summary
Account History Appears in Decending Date Order In List
Limit the List by Date
19970620 Board Karuzela
19970615 Payment Received
19970615 Board Karuzela
To Recover an Item for Rebilling, Double Click on the Item in the Above List. You must recover partnership Items in the Partnership Account.
See Another Customer
Finished
Print Account Transcript

This section displays the account status after the last billed invoice (in order for this to reflect the most recent invoice, it must be marked as billed).

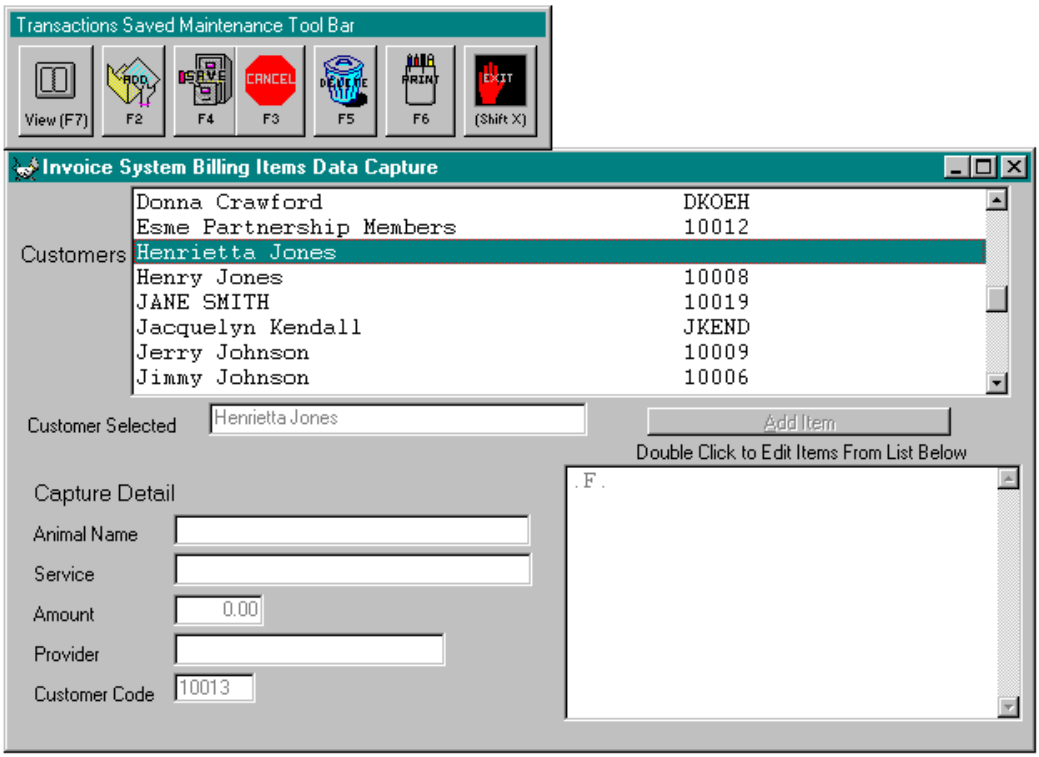
You can limit the list in the box to a range of dates.

In this section you see the previously billed items in descending date order for this customer only. You can double click on any item in the list to recover it for rebilling.

When accessing from Review Account Status on the Billing Screen, you cannot “See Another Customer”. Otherwise, you can click here to enter a new customer account code and review another account.

Maintain Saved Items

The saved items list is created when you click on the Save an Item for Recall Button underneath the detail billing information on the Billing Function Screen. You can remove items or fix items in that list using this function. (Billing Menu Item 6).



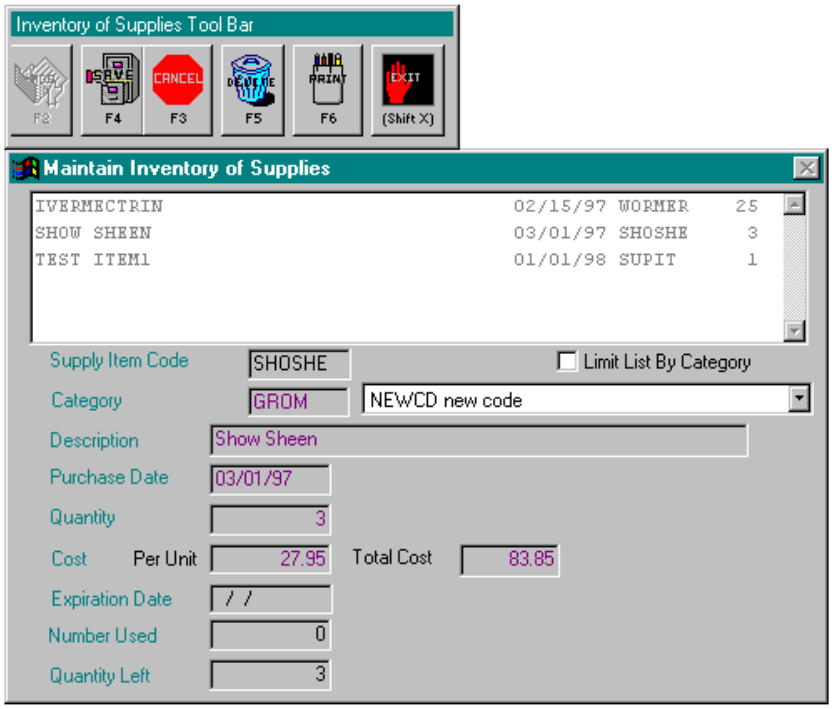
First select a customer from the list by highlighting it and double clicking.

You can add items here if you want to but you would normally add an item that you have already typed it in for a customer on the Billing Function Window.

After a customer is selected, the items which have been recorded in the recall list for the customer are shown in the list box on the lower right. To access and item for edit or delete, double click on it. When the detail is shown to the left, edit the information or click the delete button.

Inventory of Supplies

You can maintain an inventory of your veterinary, show or work supplies. The items can be grouped by a supply or inventory category. The same categories are used to catalog both supplies and equipment.



If you assign the supply item an Item Code, then later if we expand the function to allow reduction of supplies from Health and Services, you will be able to access the items by code.

You can limit the list of supply items by category by clicking here and then entering the category code.

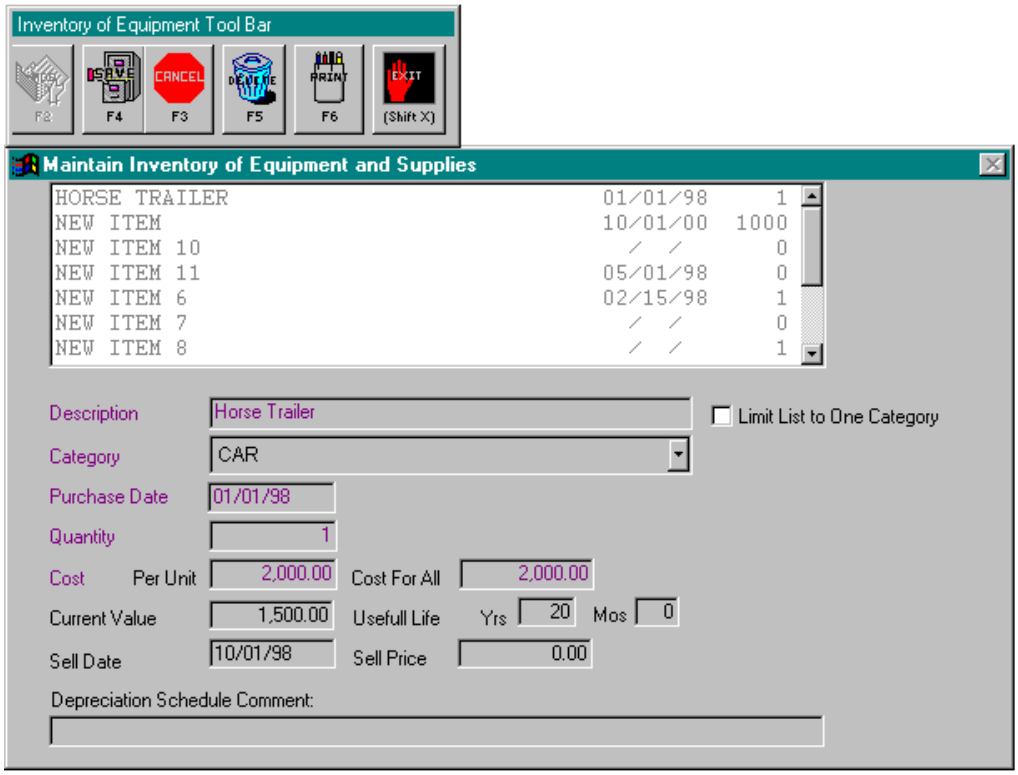
This a list of the Category Codes you have entered (see page 8-2). You can select from one of these codes in order to categorize your supplies lists.

You can post your usage here and the balance available will post below.

When you Select PRINT you can choose a report of all supply items or of just one category. You can also choose to view the list of supplies on the screen or print to the printer.

Inventory of Equipment

Use the Category Codes to define your equipment so that you can review your lists in groups.

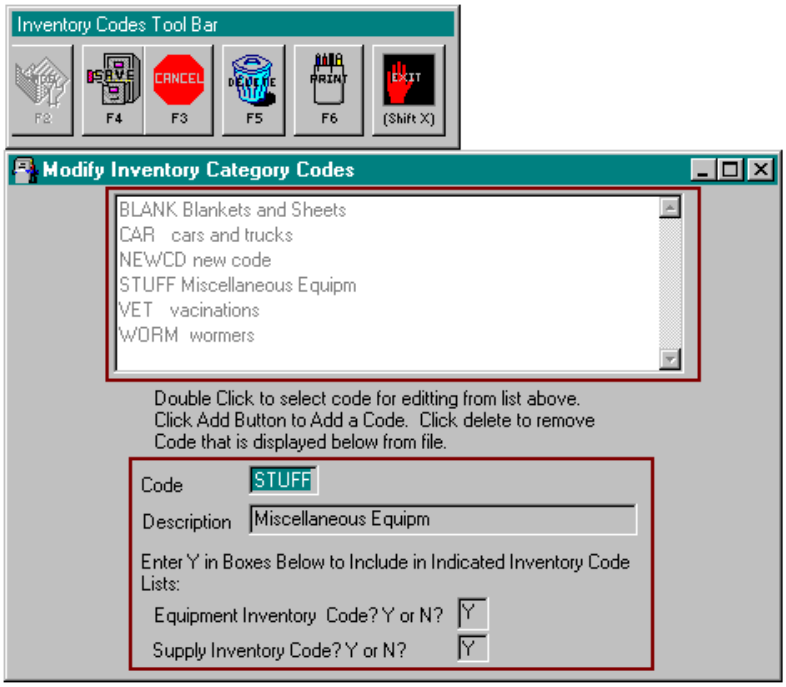


Reports available are a List of all Equipment and a list of one category. You can view them on the screen or print them.

Enter information regarding value and depreciation in this area. You can record the selling price if you sell the equipment and record comments as needed.

Maintain Inventory Codes

The Inventory Code List is used with both supplies and equipment. Define any categories you want . If you change the categories later, you will need to recode the individual inventory items.



Help and Stuff

Help

You can access help from any screen by pressing F1.

On the Help menu you can access a calculator.

Window

You can use the items on this menu to find hiding windows when your screens seem to be frozen. Click on Cycle through windows until the hiding culprit is exposed and you can answer the question being asked.

Creating a Mail Merge File from the Customer Data File

Select the Create Mail Merge File Menu Bar from the SALES/COSTS Menu or the BILLING Menu.

You can choose the drive and path for the file to copy to.

You can also limit the exported records to just customers, owner/breeders , or contacts or not limit the selection at all

You can then specify whether you want a database (Fox Pro) or an Ascii (SDF) file.

Trouble Shooting

1. My Screen is not responding to my mouse clicks.

If a window on the desktop seems to be frozen, there are two possible causes.
1). You have opened another screen and it is now active.
2). There is a message awaiting an answer in a small window behind your primary window.

To solve either problem, select WINDOW on the Menu Bar. Then continue to click on CYCLE THROUGH WINDOWS until you find the active window. You can tell you have found the active window when you can click your mouse in the window and something happens.

2. I have put in all of my animals and their ancestors and the pedigree doesn't fill in.

If the pedigree does not display all of the generations you know you entered, check the spelling of the male and female parent's name in the animal prior to the last generation which is showing. An extra space or a small 'l' (L) typed as a '1' (one) or a other unnoticeable differences might be causing the problem. The best solution is to access the animal record one generation before, and select the male and female parents' names from the Parents Choices List. Then you can be sure the spelling is accurate. If the male and female parents names are not on the Parents Choices List then you need to add them to the system using the ADD Button or you may have limited the Parents Choices List and you need to remove the limit.

3. My pictures don't show up .

When capturing Photos and Logos, you will be limited by the capacity of your computer and the Printer. The more RAM you have the better the resolution you can use on your images. If the Photo Window shows empty or the photo on the pedigree does not print, it indicates that the image is taking up too much RAM memory in the computer or the printer.

PLEASE REFER ALL QUESTIONS REGARDING IMAGE RESOLUTION, CAPTURING AND PRINTING TO YOUR SCANNER OR PRINTER MANUFACTURER.

4. On the billing screen, how do I get the health records on the invoice?

Your Health and Services Records are placed on a list which is accessed by clicking the second button on the button stack. You must first select the customer. When you click on the second button, the list of services provided to that customer's animal will appear in the list box on the bottom right. If nothing appears there, check the Animal Record in ADD/FIX ANIMALS to make sure you have the animal ownership code set the Customer's Code. If not, change the code. Then edit the Health Records for the Animal and SAVE them. This should change the code. If it doesn't, delete the health record and reenter it. You must have the Customer's Code in the Animal's Basic Record (ownership code) in order for items to pass to billing.

Use the first button on the stack to get to the items you have saved for recall on previous invoices. Or you can add an item by clicking the third button on the stack. Refer to Chapter 7.

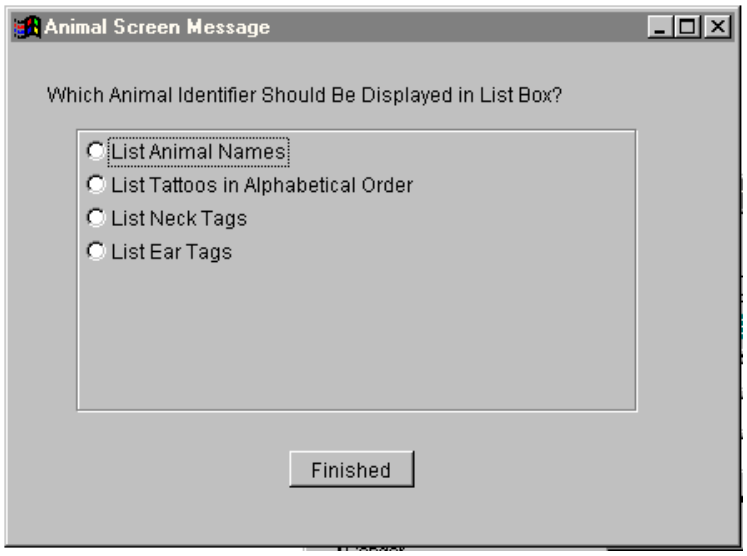
5. If you get a program error please call us for assistance.

6. If the function windows don't look right when you open them and the words seem to be drifting off the edges of the screen, you need to change your Display Settings to Small Fonts. Exit Animal Trac. Right mouse click on your desktop. Select properties. Click Settings. Select Small Fonts in the settings box. (You might have to click the Advanced Button to get to the fonts box).

The Selection Dialog

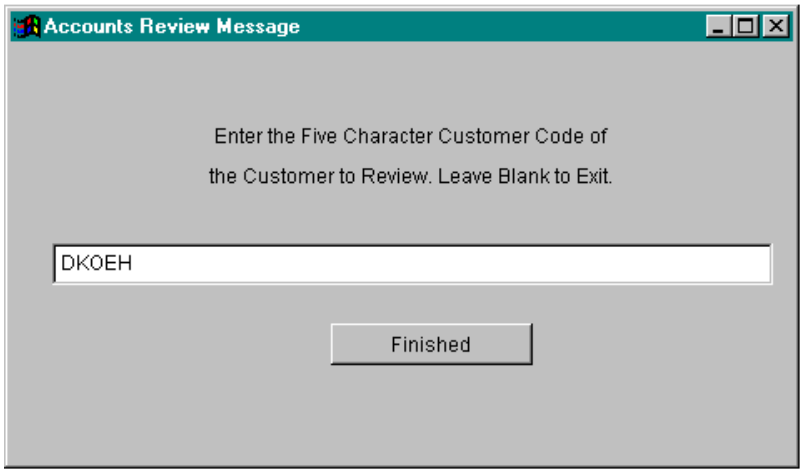
Whenever you have a choice for formatting, limiting a list or ordering a list, you will see a message box similar to the one below. Click in the Circle (Radio Button) to the left of the item of your choice and then click finished or type ALT/F or click the Control Box X.

Sometimes if you make no choice you will get an error, but ususally nothing will change in the list or on the report.

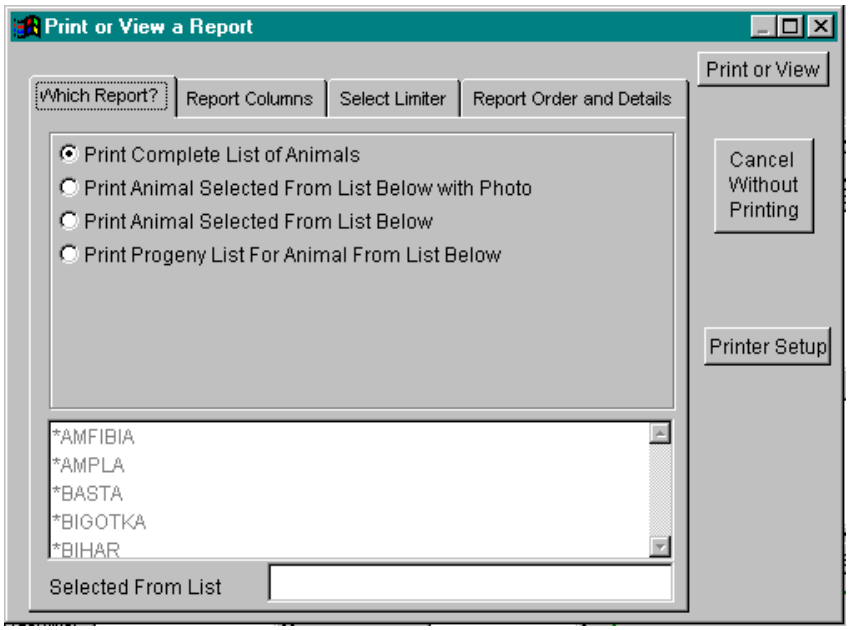


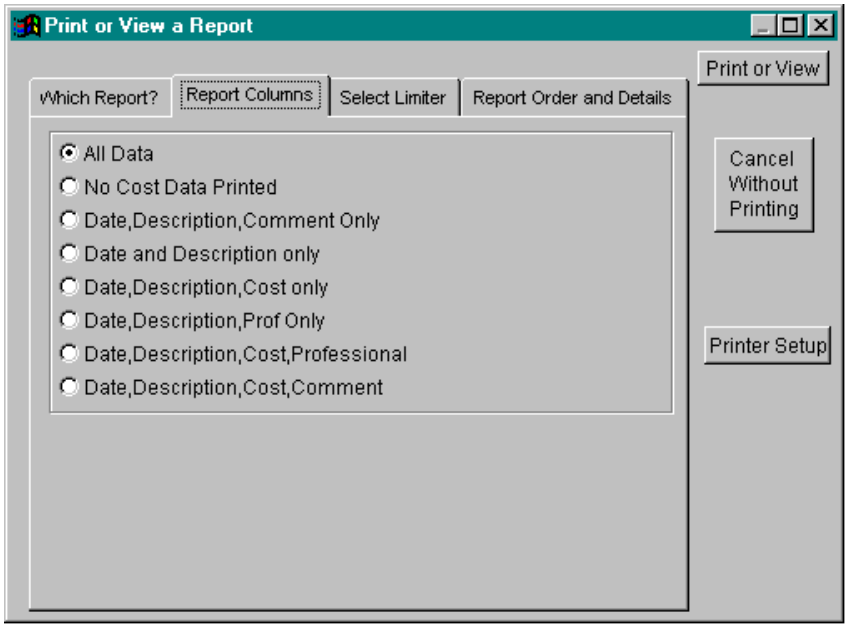
The Get Variable Dialog

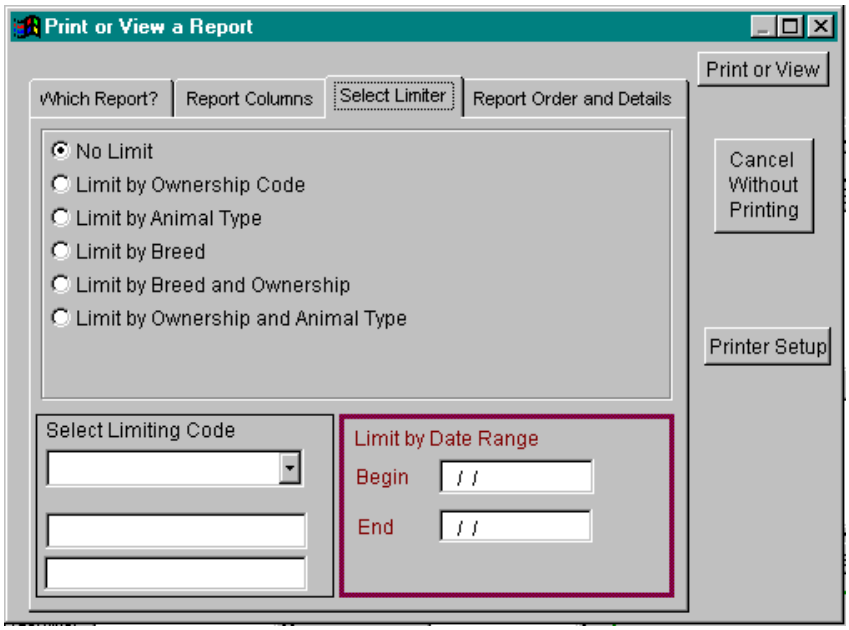
Whenever the system wants you to enter a value to use in finding something you will get a message box similar to this one. Type the value you are looking for in the box , You can then press Enter twice or click finished or the control box X or Alt/F to indicate you are finished typing.

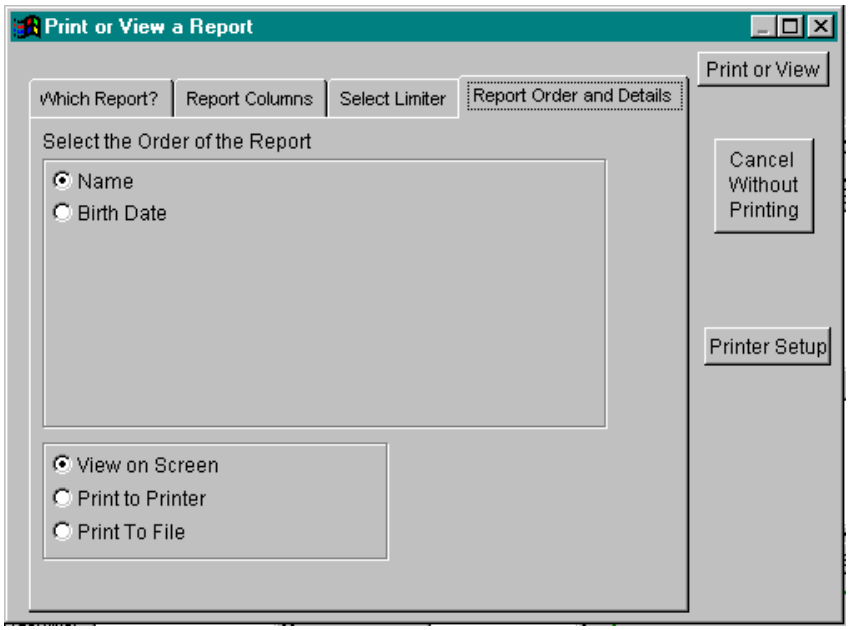

Accounts Review Message
Enter the Five Character Customer Code of
the Customer to Review. Leave Blank to Exit.
DKOEH
Finished

The Report Print Dialog






Print or View a Report
Print or View
Which Report?
Report Columns
Select Limiter
Report Order and Details
No Limit
Limit by Ownership Code
Limit by Animal Type
Limit by Breed
Limit by Breed and Ownership
Limit by Ownership and Animal Type
Cancel Without Printing
Printer Setup
Select Limiting Code
Limit by Date Range
Begin
End
/ /
/ /


Print or View a Report
Print or View
Which Report?
Report Columns
Select Limiter
Report Order and Details
Select the Order of the Report
Name
Birth Date
Cancel Without Printing
Printer Setup
View on Screen
Print to Printer
Print To File

The Calendar

The calendar is a complete "Day Timer" Personal Time manager. When you have an appointment scheduled, yo will see the date in bold or on the weekly or monthly there will be an icon. The daily calendar will show all information for each item scheduled.

Click the Page with a * to add an appointment

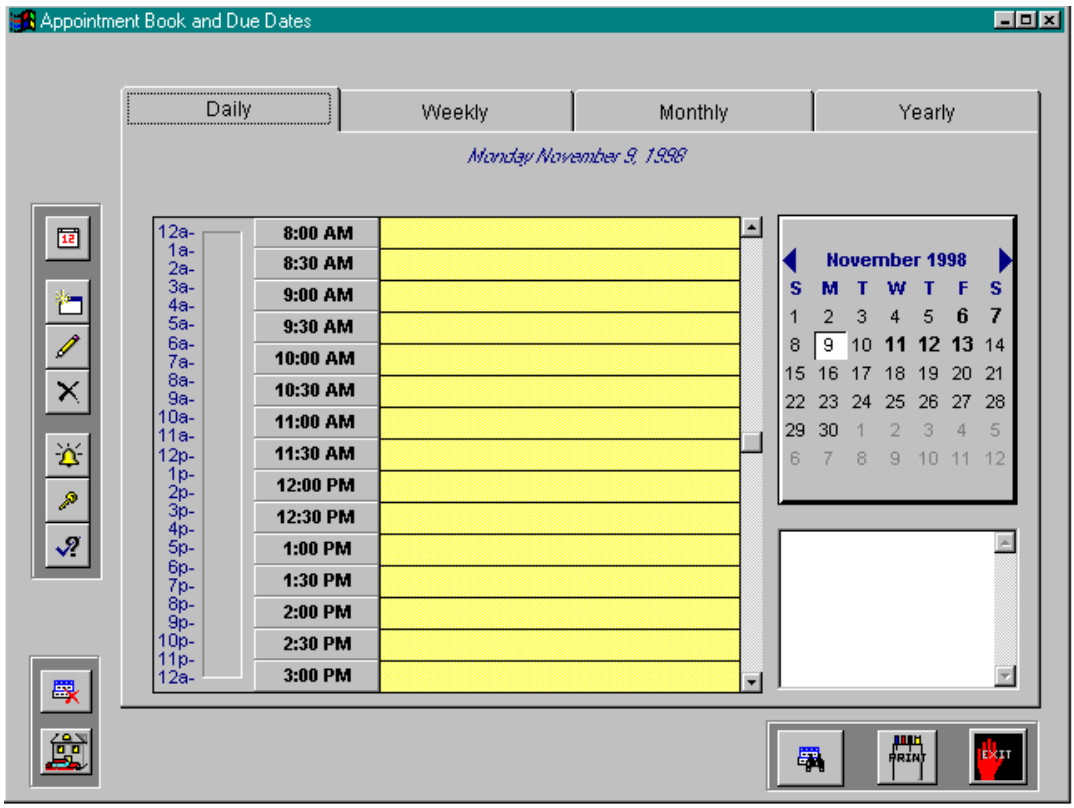
Click on the Pencil to edit a highlighted appointment

Click the X to delete the appointment.

Click the bell to set up a reminder on the appointment.

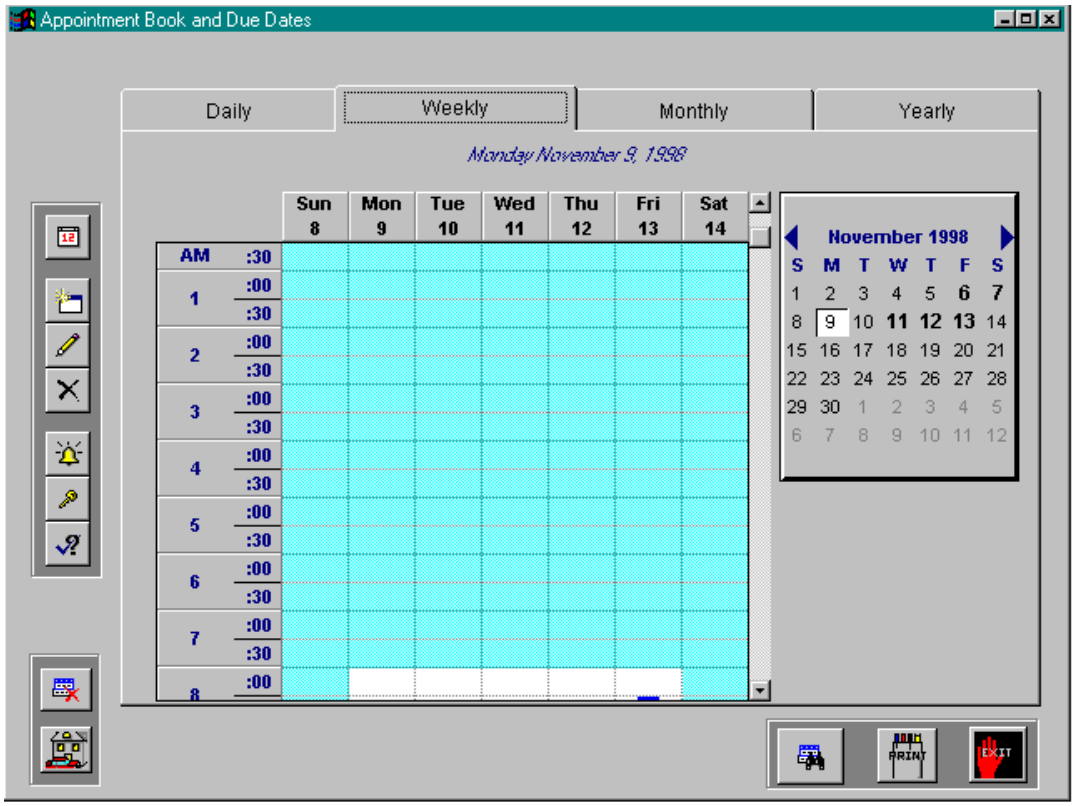
Click the Push Pin to make the appointment private.

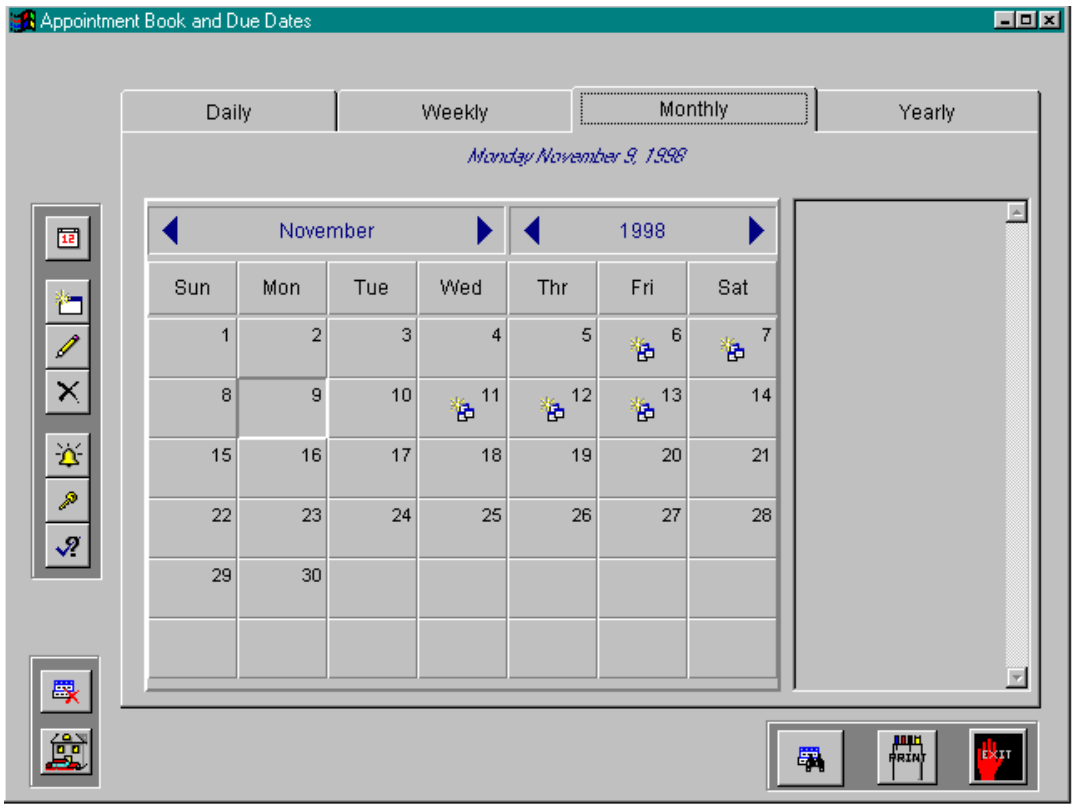
Click the check with ? to make the appointment tentative.

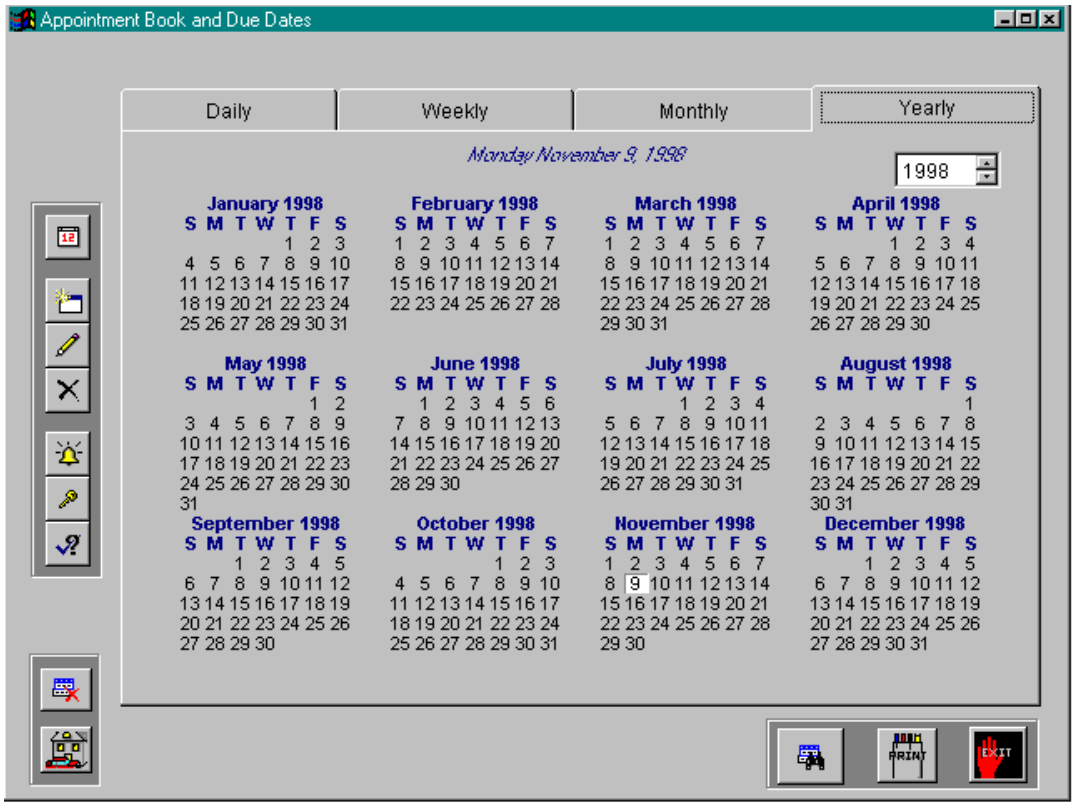


Click on the document with X button to purge the calendar of old appointments.
Click on the "House" to "Pack " the calendar and remove all deleted appointments.

If you need help, click on the document with binoculars button. Click Print to print a page.


Appointment Book and Due Dates
Daily
Weekly
Monthly
Yearly
Monday November 9, 1998
Sun 8
Mon 9
Tue 10
Wed 11
Thu 12
Fri 13
Sat 14
AM
:30
1
:00
:30
2
:00
:30
3
:00
:30
4
:00
:30
5
:00
:30
6
:00
:30
7
:00
:30
8
:00
November 1998
S M T W T F S
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 1 2 3 4 5
6 7 8 9 10 11 12
PRINT
EXIT


Appointment Book and Due Dates
Daily
Weekly
Monthly
Yearly
Monday November 9, 1998
November
1998
Sun
Mon
Tue
Wed
Thr
Fri
Sat
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30
PRINT
EXIT

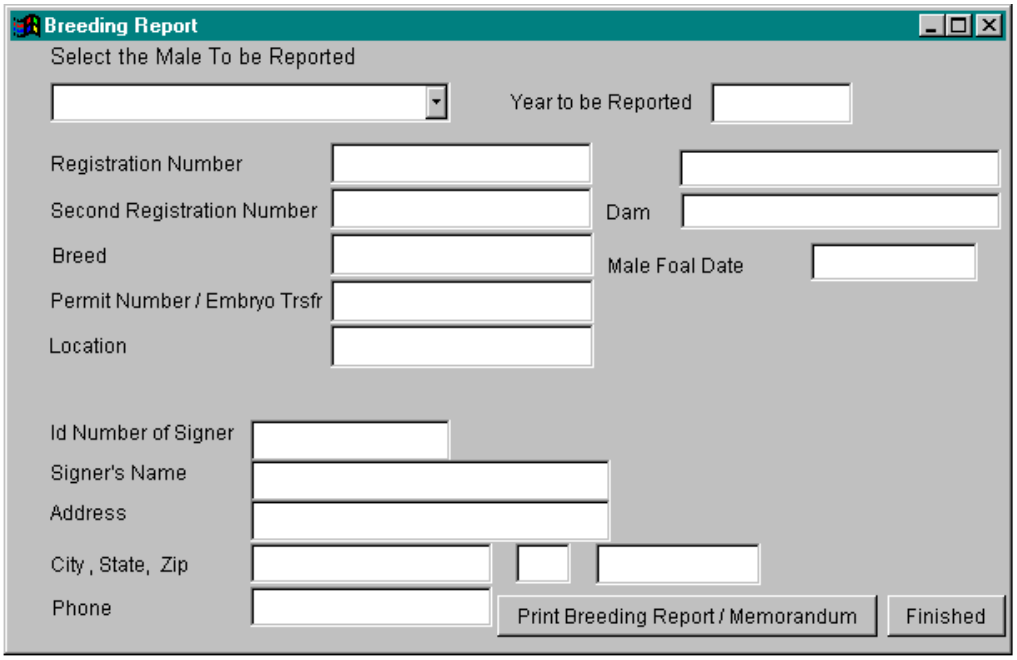

Appointment Book and Due Dates
Daily
Weekly
Monthly
Yearly
Monday November 9, 1998
1998
January 1998
S M T W T F S
1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31
February 1998
S M T W T F S
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
March 1998
S M T W T F S
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31
April 1998
S M T W T F S
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30
May 1998
S M T W T F S
1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31
June 1998
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30
July 1998
S M T W T F S
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31
August 1998
S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
September 1998
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30
October 1998
S M T W T F S
1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31
November 1998
S M T W T F S
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30
December 1998
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31
PRINT
EXIT

SPECIAL EDITION FEATURES

Breeding Service Reports (Stallion Service or Buck Service Reports)

Select the Menu Item , Print Breeding Reports, from the Breeding Records Options , Access Special Edition Features Sub Menu.

The Breeding Reports Function Window will open .



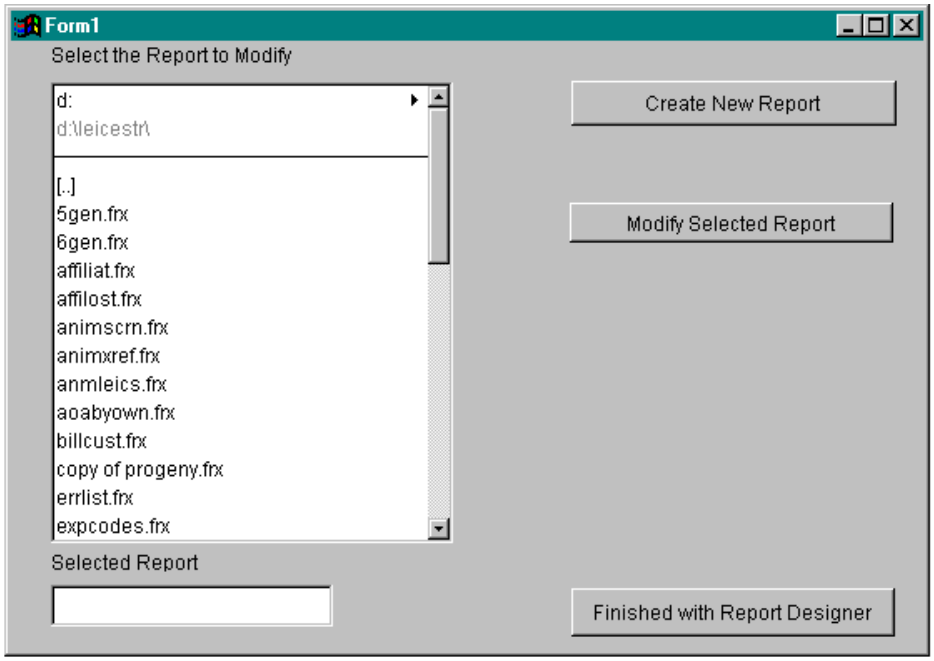
Choose the name of the Male to be reported from the list of names at the top of the window.

Fill in any necessary information for your Stallion or Service Report.

In order for the names of the female owners to be found, you will need to have entered the "Customer Account Code" from the Customer Address Book in the Female's "Ownership Code". Also in order for the breeding to be "reported" you must have entered a Breeding Record in the Breeding Function.

Click print for the report you want to generate. Be sure to use official registry forms for your reports.

.Report Designer



Using the Report Designer

1. Select the report you want to modify from the list. Double click it. The name will show in box below under Selected Report.

2. Click on Modify Selected Report.

3. The Report Designer will open the report. It is suggested that you only modify cosmetic details such as placement of fields on the page, fonts, point sizes, colors etc.

Adding Fields to the report becomes a little more complicated as you have to know the structure of the files .

Most report data is built inside the system so is not available in the report designer. You can create new reports if you like and run them directly from the designer.

Special Edition Features

If you have ordered a special edition, Select Access Special Edition Feature on the Animal Records, Breeding Records Options Menu. The system will start up the Registration Screen for the Special Edition you have ordered.

To use the Special Edition Registration Function, Select the name of the animal to be registered from the list at the top of the Function Screen. The boxes will fill with information stored in the animal and breeding records.

Add any information that is necessary for your breed. Changes made here do not update the Animal or Breeding Files. Also not all information that you see on the screen will be needed for your particular registration application.

There are two buttons at the bottom of the Special Edition Function Screen. The Owner/Breeder Information button will bring up another Function where you can enter the information about the owner of sire, owner of dam, new transfer owner, etc. The system gets the owner information from the "Customer Address Book". Enter all of the owners in the Customer Address Book as Owner/Breeders. When you select Owner/Breeders in the customer address book, the system will ask you to enter the Registry owner Id.

The Additional Information Button allows you to enter additional information that is unique to your special edition.

After all of the information has been entered, Click the Print Registration Form button for the Registry you are printing. Be sure to have official forms from the registry available to print your final copy.

Report Designer Details

You can add queries and reports to select and display data. Your queries can be directed to a variety of destinations and you can run reports separately without using a query. This chapter highlights some of the ways you can use queries and modify or create new reports.

When you use a query or a view you are actually using a SELECT - SQL statement. This chapter describes how you can use a SELECT - SQL statement whether you create it through a query defined in the Query Designer, a view defined in the View Designer, or code entered for an event or procedure. For detailed information about views, see Part 2, Finding Information, in the *User's Guide*.

Adding Queries

When you add queries to your application, you can combine a variety of data sources, finely filter records, manipulate data, and sort the results — all with the SELECT - SQL statement. By using the SQL statement, you have complete control over the results your query produces and where the results are stored.

A query is a SELECT - SQL statement.

You can add SELECT - SQL statements to procedures or to event code. For more information about events, see Chapter 4, Understanding the Event Model.

Creating SELECT - SQL Statements

To create a SELECT - SQL statement

- Use the **Query Designer** or the **View Designer** to build the statement, then copy the contents of the SQL window into a code window.

  – Or –

- In a code window, type the SELECT - SQL statement.

For example, you can select all the records from the Customer table in the TasTrade database where the country field contains the value "Canada."

```
SELECT * ;
    FROM tastrade!customer ;
    WHERE customer.country = "Canada"
```

To execute the command immediately, you can enter the statement in the Command window. If you want each clause to appear on a separate line within the window, end each line except the last one with a semicolon so that Visual FoxPro processes the command only after the last line.

Selecting a Number or Percentage of Records

If you only need a certain number or percentage of records from the result set that your query would return, you can use the Top property on the Miscellaneous tab in the Query or View Designers or you can add a TOP clause to your SELECT - SQL statement. The number you provide in a TOP clause can range from 1 to 32767. For a percentage, you can use from 0.001 to 99.99.

For example, you can select the top ten records from the Customer table in the TasTrade database using the TOP keyword in the SELECT clause.

```
SELECT TOP 10.00 * ;
        FROM tastrade!customer
```

If you want to select a percentage of records, you can use the PERCENT keyword in the SELECT clause.

```
SELECT TOP 10.00 PERCENT * ;
        FROM tastrade!customer
```

To control which records are at the top in the results, you can use an index on the record source or the ORDER BY clause of the SELECT - SQL statement.

For example, if you want to select the top ten customers with the highest order amounts, you can specify a GROUP BY on CUST_ID to show one aggregate record for each customer and sort by ORDER_AMT in the ORDER BY clause. To get a true TOP 10, you need to specify a descending sort on the ORDER_AMT so that the records with the highest order amounts appear first in the results. If you use an ascending sort, the result records are ordered from the least order amount to the most. The top records you select from the result set would actually have the lowest values.

```
SELECT TOP 10 *;
 FROM  testdata!customer INNER JOIN testdata!orders ;
   ON  Customer.cust_id = Orders.cust_id;
GROUP BY Customer.cust_id;
ORDER BY Orders.order_amt DESC
```

Specifying Destinations for Query Results

By using clauses of the SELECT - SQL statement, you can specify several destinations to store your query results.

To send results to this destination	Use this clause
Separate table	INTO TABLE mytable
Array	INTO ARRAY aMyArray
Temporary table	INTO CURSOR mycursor
Active window	TO SCREEN
Browse window	The default if no other destination is specified.

Once the results are stored, you can use commands to control how the stored results are integrated for display or printing.

Storing Results in a Table, Array, or Cursor

You can store your query results in a table, array, or cursor for other uses such as populating forms and printing reports and labels. If you want to store the results only temporarily, send the results to an array or cursor. If you want to store the results permanently, send the results to a table.

To specify a table as the destination

- Use the INTO clause of the SELECT - SQL statement to specify a destination.

This example shows an INTO clause for a table.

```
SELECT * ;
        FROM tastrade!customer ;
        WHERE customer.country = "Canada" ;
        INTO TABLE mytable
```

To specify an array as the destination

- Use the INTO clause of the SELECT - SQL statement to specify a destination.

This example shows an INTO clause for an array.

```
SELECT * ;
      FROM tastrade!customer ;
      WHERE customer.country = "Canada" ;
      INTO ARRAY aMyArray
```

To specify a cursor as the destination

- Use the INTO clause of the SELECT - SQL statement to specify a destination.

This example shows an INTO clause for a cursor named mycursor.

```
SELECT * ;
      FROM tastrade!customer ;
      WHERE customer.country = "Canada" ;
      INTO CURSOR mycursor
```

If you create a table or an array, you can use it like any other table or array in Visual FoxPro. If you create a cursor, you can browse through its contents. The cursor is opened in the lowest available work area. You can access it by using the name you gave it in the SELECT - SQL statement.

The following two procedures describe two common ways to include query results stored in tables and cursors into an application.

Printing Results in a Report or Label

If your report or label includes groups or you otherwise need to order the data, you can use the various clauses of the SELECT - SQL statement to get the exact results you need.

To send results to an existing report or label

- Use the SELECT - SQL statement with a REPORT or LABEL command.

This example uses the GROUP BY and ORDER BY clauses as well as the REPORT FORM command.

```
SELECT * ;
      FROM tastrade!customer ;
      WHERE customer.country = "Canada" ;
      GROUP BY customer.region ;
      ORDER BY customer.postal_code, customer.company_name ;
      INTO CURSOR MyCursor
REPORT FORM MYREPORT.FRX
```

This example uses a LABEL FORM command.

```
SELECT * ;
      FROM tastrade!customer ;
      WHERE customer.country = "Canada" ;
      GROUP BY customer.region ;
      ORDER BY customer.postal_code, customer.company_name ;
      INTO CURSOR mycursor
LABEL FORM MYLABEL.LBX
```

While the SELECT - SQL statement is the most flexible method for populating your report or label, it is not the only method. For more information about setting report data sources, see the section Controlling Data Sources later in this chapter. For more information about

integrating the report destinations into your application, see Integrating Queries and Reports later in this chapter.

Adding Reports and Labels

After you collect and organize your data, you can add reports or labels to your application to print the data or display it on the screen. You can control the data in your report through the data sources you choose, and manipulate and combine raw data with report variables. *Report variables* store values that are calculated and used in a report.

Controlling Data Sources

To control the data sources for a report, you can define a data environment that is stored with the report or you can activate specific data sources in code each time you run a report. For more information about using the Data Environment Designer, see Chapter 9, Creating Forms.

To Add

Always use the same data sources. Tables or views to the report's data environment.
DO *query* or SELECT - SQL to the Init event of the report's data environment.
Use separate sets of data sources. USE *table*, USE *view*, DO *query*, or SELECT - SQL to the Click event or other code that precedes a REPORT or LABEL command.

If you use a table as the data source, use aliases on the fields in the report only if you do not plan to use the report with any other data source than the table itself. If you use a view or query as the data source and aliases are included in the report controls, the report might display the same record repeatedly on the report page.

Controlling Record Order

You can use the data sources used by the report to control the order the records print in your report. The records are processed and printed in the order they appear in the table, view, or query. To order the records in a table, you can set an index in code or as part of the report's data environment. For a query, view, or SELECT - SQL code, you can use the ORDER BY clause. If you do not order the records using the data sources, the only way to use just the report to order the records is through the ORDER property on a cursor in the data environment.

Controlling Record Selection

In addition to the order records appear in the report, you can select which records are printed by using the data source, the report printing options, or a combination of both.

To use Add

View or query Conditions in the **Filter** tab
SELECT - SQL WHERE or HAVING clause
Report Designer Setting in the **Print Options** dialog box
REPORT command Scope, FOR, or WHILE expressions
Table Filtered index

Protecting a Report's Data Session

To prevent changes in other designers to the global data session, such as moving the record pointer, from affecting your report's data session you can set its data session to private.

To set a private data session

- From the **Report** menu, choose **Private Data Session**.

For more information about using the Data Environment Designer, see Chapter 9, Creating Forms. For more information about data sessions, see Chapter 17, Programming for Shared Access.

If you want to display your query results in a graph, you can use the Graph Wizard, the Query Designer, or a SELECT - SQL command. To use the Query Designer or a SELECT - SQL command, follow the steps below. You need to include at least one numeric field in your result set to create a graph. After completing the query, you can select one of six types of graphs, each with two variations.

To modify the graph

1. Browse the table containing the graph.
2. Double-click the general field to display the graph.
3. Double-click the graph to open Microsoft Graph and display the Microsoft Graph toolbar.
4. Modify the graph in Microsoft Graph.

Refining Page Layout

You can refine the layout of your report pages by defining multiple columns and changing the area of the page reserved for a band by changing the height of each band.

Defining Multiple Columns on a Page

To create phone directories, mailing labels, or other types of listings, you can define multiple columns per page.

To define a multi-column report

1. From the **File** menu, choose **Page Setup**.

   Page Setup dialog box with columns defined

2. In the **Columns** area, enter the number of columns for the page. This is the same as the number of records you want to print across the page.
3. In the **Width** box, enter a value for column width.
4. In the **Spacing** box, enter a value for the space you want to appear between each column.

   Tip If you are printing groups set to start on a new page, do not use the Print Order option.

5. Choose **OK**.

   The **Report Designer** reflects your changes.

If your layout already contained report controls in the Detail band, you may need to move or resize them to fit within the boundaries of the new column.

Setting Report Band Height

While designing your report, you can change the height of a report band. The height of a report band determines the amount of space that each report band uses on the page within the page margins. For example, if the Title band is set at one-half inch, the Title will appear in the first half-inch of space after the top margin. The detail band shows the amount of space devoted to each printed record. The following information applies to all of the report bands. You can set additional parameters for Group Header and Footer bands. For more information about Group bands, see the section “Grouping Data on Your Layout” in Chapter 7, Designing Reports and Labels, in the *User’s Guide.*

To set a precise band height

1 Double-click the bar for the appropriate band.

A dialog box for the band appears.

In the **Height** box, enter a value for the height.

3 Choose **OK**.

Using Expressions and Functions in Field Controls

You can include field controls in your report or label to display values from a variety of expressions, including fields from tables and views, variables, and calculations. The following sections describe some commonly used expressions and functions such as multiple fields, dates, or page numbers.

Adding Field Controls

You can add field controls in several ways.

To add table fields from the data environment

1 Open the report’s data environment.
2 Select a table or view.
3 Drag fields onto the layout.

To add table fields from the toolbar

1 From the **Report Controls** toolbar, insert a **Field** control.
2 In the **Report Expression** dialog box, choose the dialog button after the **Expression** box.
3 In the **Fields** box, double-click the name of the field you want.

The table name and field name appear in the **Expression for Field on Report** box.

Note If the **Fields** box is empty, add a table or view to the data environment.

You do not have to keep the table name alias in the expression. You can delete it or you can clear the **Expression Builder** options..

4 Choose **OK**.
5 In the **Report Expression** dialog box, choose **OK**.

After entering the expression, you can change the format or set printing, position, or stretch options. For more information, see “Adding a Comment to a Control” in Chapter 7, Designing Reports and Labels, in the *User’s Guide.*and Setting a Control’s Print Options later in this chapter.

Inserting Concatenated Field Controls

After you add your table fields, you might notice that they do not print the way you would like on the page. For example, printing the field controls for City, Region, and Postal Code separately produces unwanted spaces between each value. You can trim or concatenate the table fields into one field expression. The space required by each value for this control will vary. You can set the control to adjust for each value.

To combine several table fields into an expression

1 From the **Report Controls** toolbar, insert a **Field** control.

Tip Size the field to the least amount of room the expression will require. If more space is needed, you can set the control to stretch for larger values, but you can’t set it to shrink if less space is needed.

2 In the **Report Expression** dialog box, select the dialog button after the **Expression** box.

3 In the **Expression Builder,** select **ALLTRIM(expC)** from the **String** box.

The string function appears in the **Expression** box with expC selected.

Double-click the first field name you want to appear in the control.

The field name replaces the expC.

Type a plus sign after the field name or select + from the **String** functions box.

6 Type **,** or select **Text** from the String functions list and then enter a comma.

7 Repeat steps 3 and 4 for additional fields to complete the expression and then choose **OK**.

8 In the **Report Expression** dialog box, select **Stretch with Overflow**.

When the control is populated, the space allocated to the control adjusts downward to accommodate the value of the expression. For more information about **Stretch with Overflow**, see Printing Controls with Variable-Length Values later in this chapter.

To combine several fields in an expression, place an ALLTRIM( ) function before each field name, place punctuation inside quotation marks, and place a plus sign between each of the elements in the expression. If the field value lengths do not vary, such as with postal codes or abbreviations, you can insert just the field name, as in this example:

```
ALLTRIM(city)+", "+region+"  "+postal_code
```

Notice the spaces in quotes, rather than a comma, to separate the region and the postal code.

For more examples, see the report INVOICE.FRX in the Solutions Sample.

Trimming and Concatenating Character Expressions

To quickly trim and concatenate character expressions in the Expression Builder, you can place commas between character expressions. The value of the expression preceding the comma is trimmed. You can also use semicolons to place the expression on a new line, provided that the trimmed value has a length greater than zero. The following example shows character expressions for fields in a mailing address:

```
contact_name; address; city, region, postal_code
```

Note Use these when you do not want to include punctuation in the value.

If you use these methods, make sure the field is set to Stretch with Overflow. For more information, see Printing Controls with Variable-Length Values later in this chapter.

Inserting the Current Date

You can insert a field control that prints the current date.

To insert the current date

1. From the **Report Controls** toolbar, insert a **Field** control.
2. In the **Report Expression** dialog box, select the dialog button after the **Expression** box.
3. In the **Expression Builder,** select **DATE( )** from the **Date** list.
4. Choose **OK**.
5. In the **Report Expression** dialog box, choose **OK**.

Inserting a Page Number

The Page Header or Footer bands usually contain a page number. If you use a wizard or Quick Report, a page number is inserted for you into the Page Footer band.

To insert a page number

1. From the **Report Controls** toolbar, insert a **Field** control.
2. In the **Report Expression** dialog box, select the dialog button after the **Expression** box.
3. In the **Expression Builder,** select **_pageno** from the **Variables** list.
4. Choose **OK**.
5. In the **Report Expression** dialog box, choose **OK**.

Tip You can use this procedure to insert any of the system variables from the Variables list into your report.

Defining Report Variables

To manipulate data and display calculated results in a report, you can use report variables. Using report variables, you can calculate values and then use those values to calculate subsequent values.

To define a report variable

1. Open or create a report.
2. From the **Report** menu, choose **Variables**.
3. In the **Report Variables** dialog box, select the **Variables** box and type a name for the variable.
4. In the **Value to store** box, type a field name or any other expression.
5. If appropriate, select a calculation option.
6. If appropriate, in the **Initial value** box, type an expression that sets the initial value.
7. Choose **OK**.

You can use the variable in any expression you enter in the report.

To count all the Canadian entries in the Company table, use this expression and select Count as the calculation option.

```
IIF(country="Canada",1,0)
```

The following example shows three variables for a simple time sheet.

To store this value	Create this variable	Using this expression
Time employee arrived	tArrive	hour_in + (min_in / 60)
Time employee left	tLeave	hour_out + (min_out / 60)
Total time employee was present	tDayTotal	tLeave - tArrive

You can use the tDayTotal variable in a variety of other calculations, such as the number of hours worked in a week, a month, or a year; the average number of hours worked each day; and so on.

For examples of report variables, see the reports PERCENT.FRX and INVOICE.FRX in the Solutions Sample.

Reordering Report Variables

Report variables are evaluated in the order that they appear in the list and can affect the value of expressions that use them. For example, if variable 1 is used to define the value of variable 2, variable 1 must appear before variable 2 . In the previous time sheet example, tArrive and tLeave must precede tDayTotal.

To change the order of report variables

1. From the **Report** menu, choose **Variables**.
2. In the **Variable** box, drag the button to the left of the variable to rearrange the order.
3. Choose **OK**.

Setting a Variable's Initial Value

If you use a variable in calculations, be sure that you initialize the variable with a non-zero value to avoid a division-by-zero error. If you do not specify a value, Visual FoxPro assigns a default value of 0.

To set a variable's initial value

1. From the **Report** menu, choose **Variables**.
2. In the **Variable** box, select the variable you want to set.
3. In the **Initial value** box, enter the value.
4. Choose **OK**.

If you reorder the groups in your report, your report variables might not be resetting on the correct field. For example, if your report has two groups, the first grouping by country and the second grouping by date, and you switch the order of the groups, the variables still reset according to the original positions of the groups.

You can change the value of a calculation by specifying when the variable is reset. By default, Visual FoxPro resets the report variables at the end of the report.

To reset a variable at the end of a report, a page, or a column

1. From the **Report** menu, choose **Variables**.
2. In the **Reset at** box, choose an option.
3. Choose **OK**.

To reset a variable on entry or exit of any band

1. In the **Report Designer**, open the report.
2. Double-click the bar for the report band.
3. In the **Run expression** area of the band's dialog box, choose the dialog button at the end of the **On entry** or **On exit** box.
4. Enter an expression to reset the variable each time the band is entered or exited.

Formatting Field Controls

After inserting a field control, you can change the control's data type and print format. Data types can be Character, Numeric, or Date. Each of these data types has its own format options, including the option to create your own format template. The format determines how the field is displayed when the report or label is printed.

You can enter format functions directly in the Expressions box of the Report Expression dialog box or you can select options from the Format dialog box.

Typically, you might convert all alphabetical output to uppercase, insert commas or decimal points in numeric output, display numeric output in currency format, or convert one date format to another.

Formatting Options for Report Controls

For field controls, you can set a variety of format options for each data type.

To format a field control

1. Choose the **Field** control.
2. In the **Report Expression** dialog box, choose the dialog button after the **Format** box.
3. In the **Format** dialog box, select the data type for the field: **Character**, **Numeric**, or **Date**.

   The **Editing options** area displays the formatting options available for that data type.

Note This data type applies only to the report control. It reflects the data type of the expression and does not change the data type of the field in the table.

4 Select the justification and format options you want.

The Format dialog box displays different options depending on the data type you choose. You can also create a format template by entering characters in the Format box.

Justifying Text in a Field

You can justify field contents within the control in two ways. This setting does not change the position of the control on the report, only the contents within the space of the control.

To justify text in a field control

1 Select the controls you want to change.
2 From the **Format** menu, choose **Text Alignment**.
3 From the submenu, choose the appropriate command.

To justify text in a field

1 Choose the **Field** control.
2 In the **Report Expression** dialog box, choose the dialog button after the **Format** box.

Format dialog box for a Numeric expression

3 In the **Format** dialog box, select the data type for the field: **Character**, **Numeric**, or **Date**.
4 Select the justification and format options you want.

Defining Field Format Templates

A format template allows you to customize the format of the field. By entering a combination of characters and codes in the Format box of the Report Expression dialog box or the Format dialog box, you can create a wide variety of print formats. The characters you enter appear as literal text along with the field value. The codes you enter determine the appearance of the field output. For example, if you use the following format template for a 10 -digit numeric field, the characters (parentheses, spaces, and dashes) are printed along with the numeric data.

Format Template	Printed Output
(999) 999-9999	(123) 456-7890

Changing Fonts

You can change the font and size of text for each field or label control or you can change the default font for the report.

To change fonts and size in a report

1 Select the control.
2 From the **Format** menu, select **Font**.

The **Font** dialog box appears.

Select the appropriate font and point size and then choose **OK**.

To change the default font

1. From the **Report** menu, choose **Default Font**.
2. In the **Font** dialog box, select the appropriate font and point size you want as the default and then choose **OK**.

   Only the controls inserted after you changed the default font will reflect the new font settings. To change existing objects, select them all, and then change the font using the Font option on the Format menu.

Cropping a Picture or OLE Object

The picture or OLE object you inserted might not fit the frame you drew when you created the control. By default, the picture or object retains its original size. You can clip or scale it to fit into your frame.

If the picture or OLE object is bigger than the frame you created in the Report Designer, only a portion of the picture or object appears in the frame. The picture or object is anchored at the top and at the left of the frame. You cannot see the lower right portion that extends beyond the frame.

To fit a picture in the frame

1. In the **Report Designer**, create a **Picture/OLE Bound Control**.
2. In the **Report Picture** dialog box, select **Scale picture – Retain shape**.

The whole picture appears, filling as much of the frame as possible while retaining its relative proportions. This protects your picture from vertical or horizontal distortion.

To fill the frame with the picture

1. In the **Report Designer**, create a **Picture/OLE Bound Control**.
2. In the **Report Picture** dialog box, select **Scale picture – Fill the frame**.

The whole picture changes to fill the frame that you sized. If necessary, the picture is stretched vertically or horizontally to fit the frame.

To see an example of a report with pictures, see the report WRAPPING.FRX in the Solutions Sample.

Centering an OLE Object

The OLE objects included in a General field can vary in shape and size. If the object in a General field is smaller than the frame, it appears in the upper left corner of the frame. You can center it to ensure that all objects smaller than the frame are centered in the frame in the report or label. File pictures do not need to be centered because they do not vary.

To center General field OLE objects

1. In the **Report Designer**, create a **Picture/OLE Bound Control**.
2. In the **Report Picture** dialog box, select **Center picture**.

The printed OLE objects are centered within the area when the report is previewed or printed.

Changing Colors of Report Controls

You can change the color of a field, label, line, or rectangle.

To change colors

1. Select the controls to change.
2. In the **Color Palette** toolbar, choose **Foreground Color** or **Background Color**.
3. Select the color you want.

Setting Print Options for Controls

The general layout and band position of your controls determine the time and place they are printed. You can also set specific print options for each control. Each control has a default size based either on its value (fields and labels) or the size you created (lines, rectangles, and pictures). The length of the control on the layout defines the display width of the control. Because the value of some controls will vary from record to record, you can set the height of the control to stretch downward to display the entire value. If you do not set it to stretch, the value will be truncated within the display width. You cannot resize Label controls, but you can resize all other controls.

Printing Controls with Variable-Length Values

If you want a control to use only the space needed by its value, you can set it to stretch. For example, the values in an expression can vary from record to record. Rather than allot a fixed amount of space on the report that accommodates the longest value, you can set the control to stretch downward to display the entire value. You can set controls below the stretching control to float down the page relative to the stretching control.

Examples of controls set to stretch and float

The stretch option is available for fields, vertical lines, rectangles, and rounded rectangles.

For an example of controls that stretch and float, see the report WRAPPING.FRX in the Solutions Sample.

To set a field to stretch with its value

1. Double-click the field control to display its dialog box.
2. Select **Stretch with overflow**.

Controls that are placed relative to controls that stretch must be set to float or they will be overwritten.

To set a control to float

1. Double-click the control to display its dialog box.
2. In the control's dialog box, select **Float**.

Caution Some of your data could be overwritten during printing if: (1) you position a field relative to the bottom of the band and include *below* this field another field that is positioned relative to the top of the band and can stretch; or (2) you position a field relative to the top of the band and include *above* this field another field that is positioned relative to the top of the band and can stretch.

You can also set lines, rectangles, and rounded rectangles to stretch. They can stretch relative to the band or, if part of a group of controls, they can stretch relative to the largest control in the group.

To set a line or rectangle to stretch

1 Double-click the control to display its dialog box.
2 In the **Stretch downwards** area, select an option.

To print a border around a stretchable control

1 Draw a rectangle around the stretchable controls.
2 Double-click the rectangle to display the **Rectangle/Line** dialog box.
3 In the **Stretch downwards** area, select **Stretch relative to the tallest object in group**.
4 Choose **OK**.
5 Drag a selection box around the rectangle.
6 From the **Format** menu, choose **Group**.

Selection handles appear at the corners of the rectangle. From now on you can treat all of the controls as one. The rectangle will stretch along with the stretchable field. Regardless of how far down the value in the field stretches, the rectangle will maintain its border around the field. You can place two of these groups side by side in the layout and one will not be affected by the stretching of the other.

To print one stretchable control below another

1 Insert the two controls one below the other in the layout.
2 Double-click the top control to display the control's dialog box.
3 In the **Field Position** area, select **Fix relative to top band**, and then choose **OK**.
4 Double-click the bottom control to display the control's dialog box.
5 In the **Field Position** area, select **Float**, and then choose **OK**.

The two record values will print in their entirety and will not overwrite each other.

Setting a Control's Print Options

You can control when and how often each report control is printed in your report. For more information about a control's print options, see Print When Dialog Box.

Suppressing Repeated Values

For field controls, you can suppress values repeated for consecutive records so that the value is printed once for the first record but does not appear for subsequent records until the value changes. For example, if you are printing an invoice, and one of the fields contains the date of the transaction, the date would only be printed once for transactions that took place on the same date.

To suppress repeated values

1 Double-click the control to display the control's dialog box.
2 Choose **Print When** to display the **Print When** dialog box.

Print When dialog box

3 In the **Print Repeated Values** area, select **No**, then choose **OK**.

To repeat only on a new page or column

1 Double-click the control.
2 Choose **Print When**.
3 In the **Print repeated values** area, select **No**.
4 In the **Also print** area, select **In first whole band of new page/column**, and then choose **OK**.

To repeat when the detail band overflows to a new page or column

1 Double-click the control.
2 Choose **Print When**.
3 In the **Also Print** area, select **When detail overflows to new page/column**, and then choose **OK**.

Building Print Expressions

You can add expressions to a control: they are evaluated before the field prints. If the expression evaluates to false (.F.), the field will not print. If you add an expression, all of the other options in the Print When dialog box are disabled except Remove Line If Blank.

For examples of Print When conditions, see the reports COLORS.FRX and LEDGER.FRX in the Solutions Sample.

To add a print expression

1 Double-click the control.
2 Choose **Print When**.
3 In the **Print only when expression is true** box, enter an expression.

– Or –

Click the dialog button to create an expression with the **Expression Builder.**

Suppressing Blank Lines

Your report may include records that do not contain values for every field control. By default, Visual FoxPro leaves the area for that field blank. You can remove these blank areas to create a more pleasing and continuous display of the information.

To suppress blank lines

1 Double-click the control that is likely to cause blank lines in the report.
2 Choose **Print When**.
3 Select **Remove line if blank**.

Visual FoxPro will remove the line from the report if it evaluates to blank. If the field doesn't print or if the table field is empty, Visual FoxPro checks for other controls in the line. If none

are found, the line is removed. If you do not select this option and no other controls are on the same line, a blank line is printed.

Setting Print Options for Groups

You can control how groups are printed in your report. Sometimes you may want each group to start on a separate page or you may want to control when the group header prints.

Setting Group Page Breaks

In addition to selecting the field or expression to be grouped, the Data Grouping dialog box allows you to specify page break options for groups.

Choosing a Group Header Option

You might want your groups to appear in the next column for multi-column reports, on a new page for forms, or with a new page numbered at 1. The Data Grouping dialog box offers four options to accomplish these tasks. You can:

- Start a group on a new column.
- Start each group on a new page.
- Reset the page number to 1 for each group.
- Reprint the group header on each page.

After you enter an expression, you can select these options from the Group Properties area.

Preventing Orphaned Group Headers

Sometimes a group may print partially on one page and then finish on the next. To avoid a group header from printing near the bottom of the page with the majority of records on the next page, you can set the minimum distance from the bottom that a group header will print. If the header would be positioned closer to the bottom of the page than the number of inches or centimeters you enter, Visual FoxPro prints the header on a new page.

To prevent orphaned group headers

1. From the **Report** menu, choose **Data Grouping**.
2. In the **Data Grouping** dialog box, choose or enter a value in the **Start group on new page** box.

Tip To determine a good value for orphan control, add the Group Header height to one to three times the Detail height.

Printing Suppressed Values When the Group Changes

If repeated values are suppressed, you may want them to print when a particular group changes.

To print repeated values when the group changes

1. Double-click the control to display the control's dialog box.
2. Choose the **Print When** button to display the **Print When** dialog box.
3. Select **When this group changes**.

   The groups defined for the report appear in the box.
4. Select a group from the box, and then choose **OK**.

Repeating Group Headers

When a group continues onto the next page, you might want the group header to repeat at the top of the group of continued information. If you have multiple data groups on your report, the header on the subsequent pages will be from the last group in the group list. Place all of the controls you want to print for the group header in the header band of the last group on the list.

To repeat the group header on the next page

- In the **Data Grouping** dialog box, select the group you want to repeat and then choose **Reprint group header on each page**.

  If you do not want to repeat the group header, clear this check box.

Controlling Report and Label Output

You can control where report and label output is sent by using one of these keywords with the REPORT or LABEL command:

- PRINT
- PREVIEW
- FILE

If you do not use any keywords, the report is sent to the screen or active window.

Selecting Records to Print

When you print a report, you might want to limit the number of records that appear in the report by providing selection criteria. You can:

- Choose a scope of records by specifying a quantity or range.
- Build a FOR expression that selects records that match a condition.
- Build a WHILE expression that selects records until one record is found that does not match a condition.

You can use any combination of these options. The WHILE expression overrides the other criteria.

Printing a Quantity or Range of Records

One way you can limit the number of records is to specify a quantity or range of records. Using the Scope option, you can select a single record or a group of records positioned sequentially in the file.

Note The active index and the current record pointer affect the results of the scope options Next and Rest. For example, the next record in a table indexed by last name is probably different than one in a table indexed by state. This does not affect the Record option because the number for a record does not change when the table is indexed.

To select a limited number of records

1. From the **File** menu, choose **Print**.
2. In the **Print** dialog box, choose **Options**.
3. In the **Print Options** dialog box, choose **Options**.

Report and Label Print Options dialog box

4. In the **Print and Label Print Options** dialog box, choose **Scope**.
5. Select the appropriate scope option.

To print	Choose this scope option
Every record from the source file	**All**
A range of records starting with 1	**Next**
A specific record by number	**Record**
The current record plus all of those after it to the end of the file	**Rest**

Visual FoxPro prints the report using data from the records within the scope you selected.

Printing Records That Match a Condition

If the records you want to select are not sequential within the table, you can build a logical expression that specifies selection criteria a record must meet to be printed. For example, you can choose to print all records with a particular value in a field.

To enter criteria for selecting records

1. From the **File** menu, choose **Print**.
2. In the **Print** dialog box, choose **Options**.
3. In the **Print Options** dialog box, choose **Options**.
4. In the **Print and Label Print Options** dialog box, choose **Scope**.
5. In the **For** box, enter a FOR expression.

– Or –

Make sure the records sources used by the report are open, and then choose the **For** button to use the **Expression Builder.**

Note You do not need to include the FOR command in the expression. For example, type **country = "Canada"** to see only Canadian data.

Visual FoxPro evaluates all of the records and prints the report using those records that match the condition in the expression.

Controlling Selection of Records to Print

When printing, you can specify a condition that must be met to continue evaluating and selecting records. You enter this condition as a WHILE expression. As long as the WHILE expression remains true, Visual FoxPro processes the data source. After finding a record that does not meet the condition, Visual FoxPro ends the evaluation process and prints the selected records. This option allows you to select records based on information outside of the values contained in the fields.

Tip If you use a WHILE expression on a file that has not been indexed, the selection process may end before evaluating all of the appropriate records. Before printing the report, be sure the source table has the appropriate index active for the WHILE expression you want to use.

To enter criteria for ending record selection

1 From the **File** menu, choose **Print**.
2 In the **Print** dialog box, choose **Options**.
3 In the **Print Options** dialog box, choose **Options**.
4 In the **Print and Label Print Options** dialog box, choose **Scope**.
5 In the **While** box, enter a WHILE expression.

– Or –

Choose the **While** button to use the **Expression Builder.**

Note You do not need to include the WHILE command in the statement. For example, type **sales > 1000** to see only sales above one thousand dollars.

Visual FoxPro prints the report using the records it evaluates while the expression is true.

Printing Reports and Labels

If you want to send the report to the printer, you can send it directly to the printer or display the Print Setup dialog box.

To send a report to the printer

- Use the TO PRINTER clause of the REPORT or LABEL command.

For example, the following code sends the report MyReport to the default printer and stops the report from printing on the screen.

```
REPORT FORM MYREPORT.FRX TO PRINTER NOCONSOLE
```

To display the Print Setup dialog box before sending the report to the printer

- Use the TO PRINTER PROMPT clause of the REPORT or LABEL command.

For example, the following code displays the Print Setup dialog box, sends the report MyReport to the default printer, and stops the report from printing in the active window:

```
REPORT FORM MYREPORT.FRX TO PRINTER PROMPT NOCONSOLE
```

Previewing Reports and Labels

If you want to display a preview of the report, you can send it to the Preview window in the Report Designer.

To preview a report

- Use the PREVIEW clause of the REPORT command

For example, the following code displays the report in a modal window.

```
REPORT FORM MYREPORT.FRX PREVIEW
```

By default, the Preview window is modal but allows access to the Preview toolbar. If you want to make the preview modeless, you can add the keyword NOWAIT to the REPORT command.

For example, the following code displays the report in a modeless window.

```
REPORT FORM MYREPORT.FRX PREVIEW NOWAIT
```

If you want to preview the results in a specific window, you can include the WINDOW clause to specify a window, either a form, or a window created with DEFINE WINDOW.

```
REPORT FORM MYREPORT.FRX PREVIEW WINDOW MYPREVIEWFORM
```

Integrating Queries and Reports

After you have created the components of your application, you can integrate them. The following illustration shows some ways you can add queries and reports to your application.

Some ways to integrate queries and reports

You can add code that executes a query or a report to the following objects in your application.

- A button on a form. For more information about forms and buttons, see Chapter 9, Creating Forms.
- An item on a menu or a button on a toolbar. For more information, see Chapter 11, Designing Menus and Toolbars.

To add a query, view, or program

- Add a DO or USE command to the code behind a command button on a form, a button on a toolbar, or a menu item.

For example, add code similar to one of the following lines:

```
DO MYQUERY.QPR
DO MYPROGRAM.PRG
USE myview
```

You have several options for integrating reports into your application.

- If you want the user to simply start the report and collect the printout, you can have the user initiate a report by adding the REPORT command to a control on a form, a command on a menu, or a button on a toolbar.
- If you want to allow your user to enter some variables used in the report, you can gather values from the user just as you did for queries. For example, the user could enter a specified date range that the report will include. For more information, see Collecting User Input with Queries later in this chapter.
- If you want the user to create custom reports, you can offer the user the ability to create new reports or modify existing reports with the Report Designer.

To run reports and labels

- Use the REPORT or LABEL commands.

For example, you could use code similar to one of the following lines:

```
REPORT FORM MYREPORT.FRX
LABEL FORM MYLABEL.LBX
```

To modify reports and labels

- Use the MODIFY REPORT or MODIFY LABEL commands.

For example, add code similar to one of the following lines:

```
MODIFY REPORT MYREPORT.FRX
MODIFY LABEL MYLABEL.LBX
```

To create reports and labels

- Use the CREATE REPORT or CREATE LABEL commands.

For example, you could use code similar to one of the following lines:

```
CREATE REPORT MYREPORT.FRX
CREATE LABEL MYLABEL.LBX
```